

**PRELIMINARY
REGIONAL GROWTH
MANAGEMENT PLAN
VOLUME II - APPENDICES**

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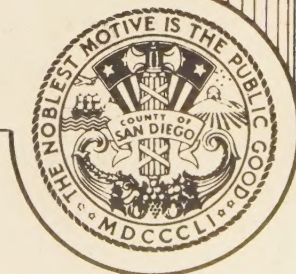
**JANUARY 1978
COUNTY OF SAN DIEGO**

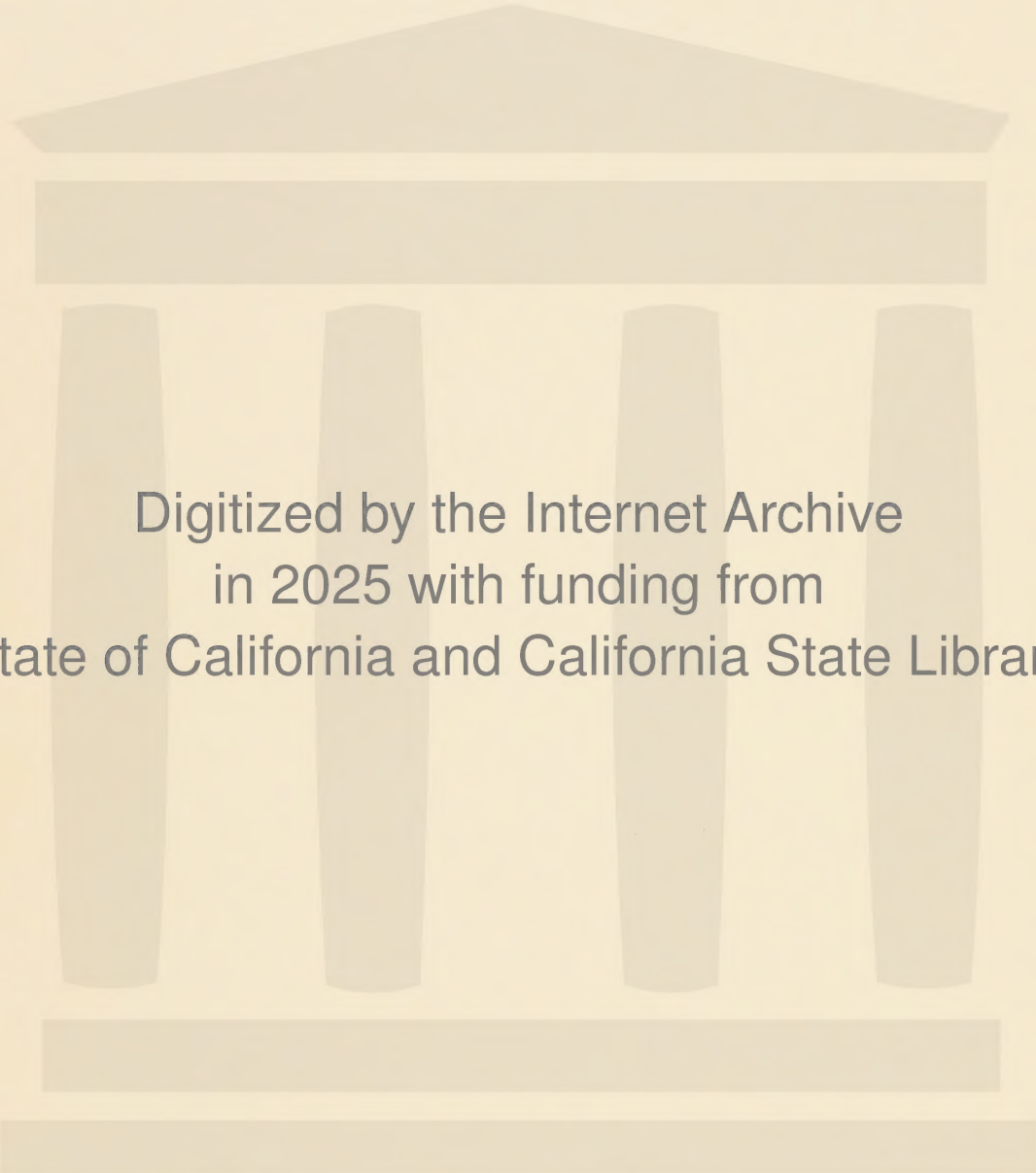
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PRELIMINARY GROWTH MANAGEMENT PLAN

VOLUME II - APPENDICES

COUNTY OF SAN DIEGO

JANUARY 1978



COUNTY OF SAN DIEGO

1600 PACIFIC HIGHWAY
SAN DIEGO, CALIFORNIA 92101

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INTRODUCTION

This is a summary of the Preliminary Growth Management Plan for the unincorporated area of San Diego County. The plan consists of a map (see Page 3) showing where future growth should occur, as well as implementing recommendations to assure that growth takes place in a manner consistent with approved goals and objectives. The timeframe for the plan extends through 1995.

What Has Happened to Date

On February 15, 1977, the San Diego County Board of Supervisors directed that a growth management plan be prepared for the County. During the evolution of the Preliminary Plan, the Board of Supervisors reviewed and approved goals and objectives, a growth area selection methodology, and an implementation package including a growth-phasing concept. These items appear as appendices to the Preliminary Plan.

Future Activities

It is important to emphasize that this plan is preliminary. Between January and April 1978 the plan will be subjected to intensive impact analyses as well as public review. Impact analyses will be carried out to determine the plan's potential environmental, economic, fiscal and social effects. At the same time, a concerted effort will be made to solicit the public's views and concerns about future growth in the region.

In April a series of hearings will be held by the Board of Supervisors to hear public comments about the plan and receive the results of the impact analyses described above.

Based on Board direction in April, a final plan will be prepared for adoption in June 1978.

Regional Growth Trends

The San Diego region has experienced rapid and sustained growth since the end of World War II, as evidenced by the following:

YEAR	POPULATION	ANNUAL GROWTH RATE
1940	289,348	--
1950	556,808	6.76%
1960	1,033,011	6.38%
1970	1,357,854	2.78%
1975	1,559,505	2.81%

This past year the region's population grew by some 40,000. It is currently projected that the region's population will grow at an average rate of 2.3% annually through the year 1995.

Unincorporated Area

The unincorporated area has experienced even more rapid and sustained growth as evidenced by the following:

YEAR	POPULATION	ANNUAL GROWTH RATE
1940	48,986	--
1950	136,624	10.8%
1960	227,386	5.2%
1970	292,625	2.6%
1975	361,756	4.3%

This past year the unincorporated area grew by 13,000. It is currently projected that the unincorporated area's population will grow at an average rate of 3.3% annually through 1995.

Traditionally, the majority of the region's residents lived in cities. While this is still true, the unincorporated area has experienced a disproportionate amount of the region's growth during the past few years.

This rapid County growth has occurred at a time when serious questions are being raised about the desirability of urbanization in the unincorporated areas generally. Some feel that County government is ill suited to adequately and equitably meet the needs of urban residents.

Problems Associated with Rapid Growth

Unmanaged, uncoordinated growth in the San Diego region has caused numerous problems. A partial list of these problems include:

Air Quality - San Diego has a serious air quality problem. In 1977 the San Diego Air Basin exceeded federal air quality standards on 119 days. The major contributor to the problem is the automobile. During the period of accelerated growth in the County, land use patterns have been encouraged that place jobs and commercial centers remote from new residential areas, thus making long commutes necessary. Continuance of such development patterns means that the automobile must continue as our major means of transit and major source of air pollution.

Inadequate Facilities - Rapid, unmanaged growth has resulted in major facilities problems. Most of the region's sewerage facilities are at or near capacity. There have been numerous sewer moratoria in the past years. Roads have been impacted. Many school systems have experienced serious overcrowding. With the recent drought and the prospect of increased use of Colorado River water by Arizona residents, the long-term outlook for imported water in the region is uncertain.

Loss of Open Space - Following current development patterns, projected regional population increases will consume 5,000 acres of undeveloped land annually, or an area about the size of the City of National City. Unmanaged growth has already resulted in the loss of much open space land and destruction of environmentally sensitive areas.

Lack of Moderately-Priced Homes - Increases in real family incomes, which average 2% annually, have not kept pace with housing price increases in San Diego. Moderate income families find it increasingly difficult to find an affordable home. This problem persists despite construction producing between 14,000 and 30,000 units annually over the past seven years.

Diminished Quality of Life - The term "Quality of Life" is difficult to define. Its meaning is the subject of much debate and controversy. Nevertheless, it sums up a concern of many of the region's residents. People in San Diego are concerned that unmanaged growth has diminished the quality of life in the region. Many of the features that make San Diego an attractive place to live seem to be threatened. People look back with fondness at the farms of Mission Valley, the uncrowded freeways, and an undeveloped coastline. Perhaps most alarming is the fear that without a concerted effort, replacing this will be senseless patchwork of endless residential suburbs stitched by freeways and neon commercial strips typical of Los Angeles.

Urban portions of the unincorporated area should be encouraged to either annex to an adjacent city or incorporate. As an alternative, urban levels of service should be financed through County Service Areas, Community Service Districts or some alternative mechanism.

How the Plan Was Developed

Selection of Areas for Growth - The formulation of the Growth Management Plan to date has closely resembled the planning done by an individual buying a home, or a business establishing a new office or plant. It began with the selection of sites. Since a majority of the region's residents now live and will in the future live in urban settings, particular attention was paid to the siting of future urban areas. Criteria for locating the best areas for urban density were drafted. As is true for a new business, the siting of urban development areas took numerous factors into account, including:

- Facility Costs
- Proximity to Existing Facilities
- Relation to Major Transportation Routes
- Environmental Constraints

Using these criteria, the best sites for urban development were located and mapped. The result was the Candidate Growth Area map made public in October 1977, and the refined Preliminary Plan Map found on page 3.

These candidate growth or urban development areas are where most of the County's future development will be directed. Before 1985, development will be encouraged in portions of Urban Development Areas closest to existing urbanization and where essential facilities are available. After 1985, or as needed, more remote lands that presently lack essential facilities will become available for urban development. In the interim, only low density development will be permitted in those areas.

Outside the urban development areas, portions of the County have been designated as estate development areas. These areas will contain large-lot rural residential and intensive agricultural uses.

Beyond the Estate Development Areas are the rural portions of the County. They are outside the service boundaries of the County Water Authority and have only limited development potential. Development in these areas will be constrained by the availability of groundwater.

Interspersed throughout the Estate Development and Rural areas are small retail/residential centers. It is recommended that growth of these County Towns be confined to areas within and immediately adjacent to existing development.

Certain areas of the County have been identified as being so sensitive or important that most types of development should not be permitted on them. These Environmentally Constrained Lands include flood plains, lagoons, wildlife habitat areas, etc.

Two Special Study Areas of the County have been excluded from the plan. They are the desert area of Borrego Springs and the unincorporated area of Otay Mesa. The desert area is unique in the County. The Borrego Springs area has been subject to substantial development pressures. Due to the unique problems associated with development in the desert, the Borrego Springs area will be the subject of a special study to be carried out by the County's Integrated Planning Office.

The Otay Mesa area is currently being studied as a potential center for economic development. Final recommendations regarding land uses on the Mesa must await completion of those studies.

Determining When Growth Can Take Place

Having identified where growth can go, the next problem was to determine when or under what conditions growth should be allowed to take place. Generally, the plan requires that growth be phased with facilities, in particular: sewer, water, fire, schools, and roads. A Facilities Adequacy Policy, Road Adequacy Policy and Rural Groundwater Policy are included in the plan to assure that this occurs.

Dealing with Other Growth-Related Issues

There are numerous other issues with which a growth management plan must deal. These include:

Housing - Growth management is primarily concerned with the future location of housing. The challenge for any growth management plan is to manage growth in such a fashion that there are adequate housing opportunities for all socio-economic groups in the region. The plan contains draft inclusionary ordinances to assure that a certain percentage of new residential construction in the County is available to low and moderate income persons. It also makes recommendations about zoning techniques that can help distribute affordable housing throughout the County.

What is Growth Management?

The term "growth management" as used in this plan refers to a collection of measures intended to accomplish the following:

1. Locate future growth in a manner reflective of Board-adopted goals and objectives.
2. Establish the conditions under which growth in those areas can take place.
3. Assure that future growth is managed in such a way as to meet housing and other economic and social needs of the region's residents.
4. Guide the establishment of appropriate governmental structures in unincorporated urban communities to maximize self-government and efficient, equitable provision of urban services.

This plan is the result of 8 months of intensive effort. In the opinion of Growth Management staff, it contains the ingredients necessary to direct growth in a manner reflective of public values and regional needs.

Before the plan is adopted, however, it must stand the test of public scrutiny and debate. Individuals and groups are encouraged to review this plan and make their concerns known. All views will be given serious consideration.

PLAN OVERVIEW

Goals and Objectives

On July 26, 1977, the Board of Supervisors authorized use of certain goals and objectives for use in preparing a preliminary growth management plan. These goals describe what the Growth Management Plan should accomplish. They can be summarized as follows:

- Urban growth should be directed to areas within and adjacent to existing urban areas. The rural setting and lifestyle of the remaining areas of the County should be retained.
- Growth should be phased with facilities.
- Growth should be managed in order to provide for affordable housing and balanced communities throughout the unincorporated area.

PRELIMINARY REGIONAL
GROWTH MANAGEMENT PLAN

A SUMMARY OF MAJOR HIGHLIGHTS
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Deterioration and Displacement - Closely related to the housing issue discussed above, are the problems of deteriorating areas and displacement of low income persons from developing areas. The plan contains policy recommendations about ways to deal with these problems.

Governmental Structure - Growth in the County has resulted in the formation of the equivalent of several moderately sized cities in the unincorporated areas. Each of these areas is under the jurisdiction of the County Board of Supervisors. Services are provided by the County and numerous special purpose governmental entities (special districts). Serious questions have been raised recently about the appropriate form of government for these areas. Generally it is felt that cities are best suited to do the job. The plan contains a Governmental Structure Policy to assure that the urban communities in the County seek municipal status or some other appropriate governmental structure.

Costs of Growth - The public is justifiably concerned about the costs associated with growth and alternative development patterns. Some of the greatest concerns have to do with impacts on taxes, on the availability of jobs, and on the price of housing. In preparing this plan, we have made certain assumptions about how growth should be managed to deal with problems such as these. These assumptions are as follows:

1. Contiguous development is to be preferred to development remote from existing urban areas. Longer service lines are most costly to build and maintain.
2. In the short run, inexpensive land in outlying areas can reduce housing costs, but these savings may be offset by higher service and commuting costs.
3. In the long run, open space disappears as land is consumed for low density single family developments. The resultant long commutes to work may significantly worsen air quality.
4. Densities of three to four dwelling units per acre are needed for self-supporting public transit systems.
5. Initial development at maximum permitted densities in urban areas is to be preferred over gradual densification which can be more costly, and often results in some type of displacement.
6. Open space needs can be satisfied more inexpensively through clustered development than by private purchase of backyards and purchase of parks.

Between January and April 1978, analyses will be performed to test these assumptions.

CAPITAL FACILITIES: KEY TO PHASING

Integrated Facilities Adequacy Analysis System

The Integrated Facilities Adequacy Analysis System is the key phasing mechanism of the Growth Management Plan. The purpose of the system is to assure that the four fundamental facilities (water, sewers, fire and schools) will be available

prior to or concurrently with growth. The system consists of the following components:

- Facilities Adequacy Matrix
- Facilities Adequacy Policy
- Facilities Standards

The Facilities Adequacy Matrix defines the various levels of potential demand that a district may experience. The matrix then defines ratings to be used in determining the district's ability to meet the various levels of demand. For fire protection, these ratings are related to the district's ability to meet certain performance standards. The matrix for water, sewer and school services is illustrated on Table 1.

The Facilities Adequacy Policy defines the actions to be taken by the Board of Supervisors and special districts for each rating. The recommended actions for each rating are contained in the bottom half of Table 1.

Finally, Facilities Standards have been defined for each growth management plan land use classification. These standards define the minimum level of service necessary to support general health and welfare in some cases, (for example schools) the standards vary from district to district.

Road Adequacy Policy

This policy calls for a special report to be prepared by the Director of Transportation when the road system in the vicinity of a project reaches low levels of service, i.e., becomes overcrowded.

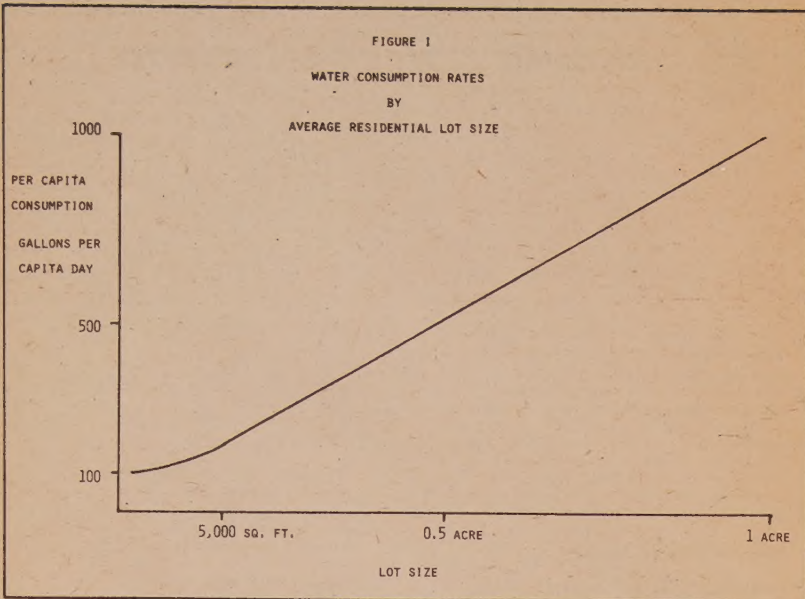
The proposed policy states that major subdivisions will not be approved where insufficient capacity exists unless:

- The capital improvement projects necessary to eliminate the deficiency are contained in the County Six-Year Capital Facilities Program; or
- The developer or project sponsor agrees to eliminate the deficiency as a condition of project approval.

LAND USE: URBAN, ESTATES AND RURAL LIFESTYLES

The land use areas illustrated on the Urban Development Area Map emerged from a series of policies aimed at conserving land and open space, preserving rural lifestyles, and protecting agriculture from urban encroachment. Many of these policies, particularly those relating to densities that will be permitted by the General Plan, also help meet other plan goals. Housing prices can be reduced through encouragement of higher densities in urban areas. Water consumption can also be dramatically reduced at higher densities lessening dependence on imported water (see Figure 1). Lower densities elsewhere protect environmentally sensitive areas and groundwater supplies.

Every effort has been made to use the current County General Plan in defining Growth Management Plan categories. Urban Development Areas in most cases correspond to residential categories in existing community plans. To a great extent, permitted uses in each Growth Management Plan classification are within the range of permitted uses in the existing plan.



The Preliminary Growth Management Plan contains four land use categories designed to provide a phased regional development strategy consistent with the availability of public facilities. These classifications are:

- 1985 Urban Development Areas
- 1995 Urban Development Areas
- Estate Development Areas
- Rural Areas

These "primary" categories are supported by three other subcategories to deal with development in unique areas. These categories are:

- Country Towns
- Environmentally Constrained Lands
- Special Study Areas

Land Use Recommendations

In the 1985 Urban Development Areas, it is proposed that the County encourage development at the maximum densities permitted by the County General Plan and Zone Compatibility Matrix.

Attempts will be made to achieve average densities of four units to the acre or greater on all developable land.

In the 1995 Urban Development Areas, which are remote from existing development, urban development will temporarily not be permitted.

On an interim basis, divisions of land will be permitted only at the largest lot sizes permitted by the County Zone Compatibility Matrix.

With the adjustment of the urban limit line (1985) every three years, development will be encouraged in accordance with the recommended uses for urban development - 1985 areas.

In the Estate Development Areas, where large lots prevail and septic tanks are the most economical sewage system, parcel sizes of 2 to 8 acres depending on slope will be permitted.

Parcel sizes down to one acre will be allowed provided lot averaging is used over the entire parcel.

Clustering at up to 33% increased overall density on projects of 20 acres or larger when at least 40% open space is dedicated will be allowed.

Clustering or lot averaging will not be permitted if it results in higher levels of service being introduced or extended into an area than would otherwise be needed to serve the underlying density.

Rural Areas will be controlled by the Groundwater Policy (see summary below). Clustering will be permitted as in Estate Areas.

Country Town boundaries will be maintained to contain urban density development and preserve their rural character. Exceptions may be made for contiguous subdivisions to meet emergency health and safety needs.

Constrained Areas, including flood plains, coastal wetlands, certain rare species habitats and agriculture will be protected. The Growth Management Plan makes specific policy statements regarding development approval in sensitive areas which are generally similar to the Rural Areas category (also see Environmental Section below).

ENVIRONMENT: MINIMIZING THE EFFECTS OF DEVELOPMENT

Many of the environmental objectives were achieved in the process of selecting Urban Development Areas as follows:

Protection of Environmentally Significant Areas

- Lagoons, flood plains, and deposits of construction quality materials are shown as constrained lands on the Preliminary Plan.
- The mountains and desert areas are shown as rural on the Preliminary Plan.

Conservation of Resources

- Space heating and cooling requirements were factors taken into account when selecting Urban Development Areas.
- Land not served by imported water is shown as "rural" on the Plan.
- Availability of water service was a factor in selecting Urban Development Areas.
- The density recommendations in both land use and housing sections support water conservation.

Achievement of Air Quality Standards

The Urban Development Area Selection Methodology emphasized development patterns that would help minimize vehicle miles traveled and trips. The Preliminary Plan:

- Encourages infilling of existing urban areas.
- Directs growth to those areas with existing or planned commercial and industrial facilities.
- Encourages growth in areas where public transit is most feasible

Rural Groundwater Policy

The eastern two-thirds of the County is totally dependent on groundwater resources. Prior to the early sixties limited land development had minor impacts on groundwater supplies; however, the recent proliferation of land development projects threatens to deplete groundwater resources.

Interim lot size controls, uniform procedures for performing groundwater studies, and ultimately a County-wide groundwater study are proposed to cope with this problem (see Chart 1).

Facts on Water

- San Diego County is almost entirely dependent on imported water. Optimistically our local supplies can meet only fifteen percent of present needs.
- The Metropolitan Water District (MWD) is now taking one million acre feet per year from the Colorado River. However, the MWD's maximum legal entitlement is about 559,000 acre feet per year.
- By 1985, when the Central Arizona Project becomes operational, MWD may be restricted to this amount.

CHART 1

RURAL GROUNDWATER POLICY

RECOMMENDED INTERIM LOT SIZE CONTROLS (In Acres)

Mean Annual Precipitation	Less Than 15% Slope	Greater Than 15% Slope
10 Inches or Less	20	40
10 to 22 Inches	8	20
Over 22 Inches	4	8

- Increased water supplies depend on construction of additional facilities in Northern California and implementation of a comprehensive water reclamation program.

- Long-term prospects for water reclamation in the region will be covered in a major study for which funding is currently being sought.

Environmental Impact Report

An Environmental Impact Report will be prepared on this Preliminary Plan. It will be available for public review in February 1978.

GOVERNMENT STRUCTURE: ANNEXATION/INCORPORATION

Generally, it is felt that provision of urban levels of service is the proper role of cities, not the County. In most cases cities are able to provide the full range of urban services more efficiently and equitably.

In urban and urbanizing communities in the unincorporated areas, urban levels of service should be provided by County Service Areas, Community Service Districts, or an alternate service agency in a structure which distributes costs fairly.

This policy encourages annexation, incorporation and local control of service delivery through zoning, coordination of development review with cities, denial of extended levels of service (urban levels), and use of recently strengthened state laws governing city boundaries (MORGA).

County Islands occur in almost every city in the County. They are the primary targets for encouraging annexation to jurisdictions encompassing them. County Islands are undesirable because of the difficulty of providing services to them.

Urban Development Areas with Potential to Annex border metropolitan areas. Urban development which occurs in these fringe areas should be coordinated with the adjacent city or urban community with potential to incorporate. Included in this category are Montgomery, Sweetwater, Valle de Oro, Santee, Solana Beach, Leucadia, Buena and the fringes of Escondido.

Urban Development Areas with Potential to Incorporate by 1985 are established communities which have expressed strong interests in incorporating. Three areas fall into this category:

1. Fallbrook is a full-service, independent community which is pursuing incorporation;

2. Poway is a dependent unincorporated area; and
3. Encinitas is a stable beach community providing a focus for incorporation in San Diego.

Urban Development Areas with Potential to Incorporate Beyond 1985 are communities developing an identity as a full-service urban community. Such slower-developing urban centers are typified by Lakeside and Ramona.

Non-Urban Development Areas with Potential to Incorporate Beyond 1985 are similar to the previous category, but are further removed from existing urban development. These include several Country Towns. Such communities are found in Valley Center, Alpine, Julian, and Borrego Springs.

Non-Urban Development Areas Without Potential to Incorporate comprise the remaining Estate and Rural Development Areas and Country Towns. Although certain watersheds are included which are recognized as areas of planning influence by some cities, it is anticipated that they will remain unincorporated through the life of this plan.

See map on page 4.

HOUSING: PRICE SQUEEZES AND MIDDLE INCOME FAMILIES

The gap between the cost of housing and what people can afford to pay is growing. This problem is evident in existing as well as new housing.

The average home in San Diego cost more than \$68,000 in October. Only about 15% to 20% of the region's households can afford housing at this price. The trends have clearly indicated that fewer households are able to purchase homes today than in 1970 (see Table 2).

There is tremendous pressure on the rental housing stock. In 1977, the estimated vacancy factor was 3.8%. A "healthy" vacancy rate is considered to be somewhat above 5%. Families with children and the elderly are particularly hard hit by low vacancy rates.

Virtually all low, moderate, and most middle-income households who do not already own their own homes are prevented from becoming homeowners. The total costs of homeownership has increased significantly in the last 10 years. The occupancy costs of the same quality single-family house has increased by 128.6% between 1967 and 1976 more rapidly than general prices. In San Diego the ratio of homeownership costs to general prices is among the highest in the nation (see Table 3).

TABLE 2
THE HIGH COST OF HOMEOWNING

Year	Median Income	Affordable Home	Average Priced Home	Difference
1974	\$10,982	\$27,460	\$40,265	\$12,805
1975	11,531	28,830	45,960	16,860
1976	12,107	30,270	52,280	22,010
1977	12,713	31,780	68,000	36,220

TABLE 3
A GEOGRAPHIC COMPARISON OF RENTS, HOMEOWNERSHIP COSTS, AND GENERAL PRICES
CONSUMER PRICE INDEX
1967 - 1976

	General Prices	Rent	Home-ownership	Ratio Of Homeownership Costs To General Prices
U. S. City Average	70.58	44.78	91.78	1.30 to 1.0
Northeast				
Baltimore	70.4	32.8	112.6	
Boston	72.4	54.4	74.6	
Buffalo	67.2	46.7	69.9	
New York/New Jersey	72.7	-	95.1	
Philadelphia	69.1	51.7	94.3	
Pittsburgh	64.1	32.4	88.9	
Washington, D. C.	67.0	45.8	80.9	
Regional Mean	69.0	44.0	88.0	1.28 to 1.0
North Central				
Chicago	60.5	35.4	71.4	
Cincinnati	67.1	23.0	99.6	
Cleveland	65.1	28.0	65.6	
Detroit	65.9	-	83.2	
Kansas City	63.4	22.3	90.3	
Milwaukee	62.5	41.4	60.5	
Minneapolis	67.1	37.5	92.7	
St. Louis	62.7	19.0	76.4	
Regional Mean	64.3	29.5	80.0	1.24 to 1.0
South				
Atlanta	66.6	30.6	90.6	
Dallas	62.7	26.3	90.0	
Houston	72.3	31.6	111.0	
Regional Mean	67.5	29.5	97.2	1.44 to 1.0
West				
Los Angeles-Long Beach	64.7	39.2	95.8	
SAN DIEGO	67.3	54.8	116.3	
San Francisco-Oakland	65.5	50.4	93.2	
Seattle	61.7	37.0	90.7	
Regional Mean	64.8	45.2	99.0	1.53 to 1.0

Source: Trends in the Real and Financial Cost of Housing: An Overview, Arthur P. Solomon, FHCB Conference, December, 1977.

The trends in the cost of housing indicate that the greatest percentage increases occurred in improved lot costs (160%), financing (175%), and fees (60%).

In 1970, the lot costs were 27% of the total housing costs while in 1977 these costs rose to 35%. In comparison, the construction costs declined from 46% to 39%. Fees increased from 3% to 4% during this period.

In addition to the recommendation regarding the use of State and Federal housing programs, two ordinances are proposed to respond to this situation.

The Moderately Priced Dwelling Unit Ordinance conditions the approval of a subdivision map upon the developer providing 15% of the units at a below market price. The incentive for providing below market housing will be a density bonus of 20%. This program should be administered by the Department of Housing and Community Development (see Table 4).

The successful implementation of this ordinance hinges on revision of the Zoning and Subdivision Ordinances to allow lots as small as 4,000 square feet as proposed in a report awaiting action by the Board of Supervisors. This is needed to permit density bonuses.

The purpose of the Low Rent Housing Ordinance is to encourage developers to provide available rental housing in the developing Urban Development Areas. A guarantee will provide that 15% of this housing will be available for low income persons receiving rent supplements. The ordinance applies to eight units or more in Urban Development Areas that will be constructed pursuant to the effective date of this ordinance. Existing subdivided lots requiring no further subdivision prior to development will not be affected by this ordinance.

A third major recommendation is to revise the Housing Element and Community Plans to allow more medium density development in urban development areas where large lot sizes effectively prevent construction of housing that middle income families can afford.

Together the above ordinances and recommendations can increase the supply of moderately priced units on the market.

SOCIAL: AID TO DECLINING AREAS

Target Area Expenditure Policy

The objective of targeting specific areas for development and for public expenditures is to prevent or turn around deterioration and to provide incentives for private investment. This policy will:

- Provide a methodology for identifying specific areas which exhibit varying characteristics of deterioration; and

- Target these areas for public funds and services to help upgrade them.

Areas which exhibit symptoms of deterioration or are rapidly urbanizing have been identified in the Regional Growth Management Program as target areas. These areas were selected using criteria defined in the Housing and Community Development Act of 1974.

Evaluation of communities focused on

1. Overall wealth;
2. Evidence of community stability; and
3. Access of residents to employment centers.

Competition among communities in the region for resources is assumed to underlie the process of community decline. Those areas showing significant instability and limited economic resources to cope with change or land use transitions were designated as target areas.

Planned Delivery of Social Service Policy

The Objective of Planned Delivery of Social Service Policy is to ensure a comprehensive assessment of future service needs within selected portions of the target areas. It will establish the use of common regional demographic and physical land use data projections based upon the Regional Growth Management Plan rather than historic trends in service demand. This information will be provided to the appropriate social service agencies to assist those agencies in the development of target area blueprints for service delivery needs linked to Regional Growth Management's phased development strategy.

Social Element Mandate

The Social Element Mandate formalizes Regional Growth Management and other existing social policies into the General Plan and provides for the development of a comprehensive General Plan which reflects local and regional social implications. The Social Element will among other things, help to assure that the social and housing needs identified in the Regional Growth Management Plan and the Housing Assistance Plan are met by coordinating with the revisions to the Land Use Element and the Housing Element to identify the appropriate balance, type and quantity of public and private land use changes necessary to provide housing for the anticipated increase in population within the framework of these plans.

TABLE 4

INCLUSIONARY ORDINANCE

Moderately Priced Dwelling Unit Ordinance (MPDU)

PURPOSE:	To assist moderate income households (\$12,000 to \$20,000) to purchase housing.
APPLICATION:	Urban residential developments of medium density (7.3 du/ac) or greater containing 40 or more units.
DENSITY BONUS:	Maximum twenty percent density bonus. Fifteen percent of units will be MPDU. For example, in a typical 100-unit development, 120 units would be permitted, 18 units would be required to be sold under the MPDU Ordinance.
PRICE:	Maximum price set by County reflecting production cost and land costs (builder's profit included in production costs).
CONDITIONS:	Buyers of MPDU will be precluded from windfall profits.
FINANCING:	Obtained from lending institutions. No direct subsidy by government.

APPENDIX I

APPROVED GOALS AND OBJECTIVES

I. INTRODUCTION

The goals in this report represent a statement of what the County growth management plan should attempt to accomplish. All the goals are not mutually supportive. Clearly, a plan based on these goals will have to balance the competing and legitimate demands resulting from continued population growth in the unincorporated area. This must be done in a way that reflects community values and needs.

Some of the areas of concern in these goals are not totally under County control. Essential public services are provided by numerous agencies and jurisdictions in addition to the County. The supply and cost of housing depends on such factors as the availability of mortgage money, consumer demand, and the cost of labor and materials. Nevertheless, the County does, to some degree, influence all the factors identified. The exercise of the County's planning and zoning authority influences the supply and cost of housing. The County provides certain services, such as law enforcement and sewage collection and treatment.

The specific concerns of growth management, as reflected in these goals are as follows:

1. Protection and Wise Use of Resources

A concept basic to growth management is the wise use of scarce resources. Two factors are important. First, the concept implies efficient, as opposed to wasteful use. Second, it implies retaining as many

options for future generations as possible. Energy conservation, implied in the former, can be promoted by location of housing in temperate zones. Contiguous urbanization, use of higher densities, and cluster developments can help preserve land resources for present and future use. In addition, there are natural limits to growth imposed by finite resources which affect the carrying capacity of the region.

2. Efficient Use and Adequate Provision of Public Facilities

Growth should be constrained by the availability of facilities. Conversely, the location, density, and timing of growth influence our ability to optimally use existing facilities. Establishment of standards for urban and rural levels of essential services can be used as a mechanism for ensuring optimal use of capacities and for phasing growth within servicable areas.

3. Provision of Adequate, Affordable Housing

Accommodation of projected population increases will require policies to encourage new construction and reduce costs. Lot size restrictions, required improvements, permit processing times, and total land area available for residential use can be eased or revised to encourage increases in housing supply. Housing costs can be reduced by use of similar techniques, as well as through use of Federal money or other funding sources to assist low income households.

4. Promotion of Economic and Social Well-being

Growth management policies influence land use patterns, the location and timing of social service provision, and the location of commercial and industrial facilities. These in turn impact the fiscal viability of communities and also have a bearing on the ability of low income groups to attain an acceptable living standard. Growth management policies also can be linked to adopted County economic development policies, such as regional employment patterns, the incidence of displacement of low income groups and minorities, and the ability of communities to annex or incorporate. Social services, including health and human care services, can be coordinated with growth management policies to stabilize and upgrade declining areas.

II. GOALS AND OBJECTIVES

OVERALL GOAL

INFLUENCE THE COUNTY'S POPULATION GROWTH AND DISTRIBUTION IN ORDER TO PROTECT AND WISELY USE SCARCE RESOURCES; PRESERVE THE NATURAL ENVIRONMENT; PROVIDE ADEQUATE PUBLIC FACILITIES EFFICIENTLY AND EQUITABLY; ASSIST THE PRIVATE SECTOR IN THE PROVISION OF ADEQUATE, AFFORDABLE HOUSING; AND PROMOTE THE ECONOMIC AND SOCIAL WELL-BEING OF THE REGION.

LAND USE

Goal

Promote wise use of the County's land resources, preserving options for future uses.

- Encourage future urban growth to be contiguous with existing urban areas and maximize use of underutilized lands within existing urban areas.
- Retain the rural character of non-urban lands.
- Limit urban densities in rural areas to lands contiguous with existing rural towns and communities.
- Encourage continuance and expansion of agricultural uses in the unincorporated area.
- Provide fiscal incentives to ease tax burdens in areas not designed for urban growth.
- Insure preservation of continuous regionally significant open space corridors.

CAPITAL FACILITIES

1. Goal - Provision and Phasing of Facilities

Assure efficient, economical, and timely provision of facilities and services* to accommodate anticipated development to 1995.

*Facilities and services covered in the Growth Management Plan include water, sewers, schools, fire protection, police protection, flood control, roads, public transportation availability in urban areas, libraries, and local parks.

- Provide future urban development with facilities and services meeting the standards defined in the Growth Management Plan (See Appendix I).
- Promote extension of facilities to areas contiguous to existing facilities and at a rate of expansion generally consistent with anticipated growth.
- Direct near-term growth to those areas where essential facility infrastructures have remaining service capacity or the capability of expansion concurrent with approved development.
- Provide essential facilities and services necessary for the minimum functioning of communities concurrent with, or prior to, urban development.
- Require availability of essential facilities prior to approving development.
- Identify and implement economies of scale in the provision of services.
- Insure sufficient funding for capital facilities and operating costs through adoption of policies regarding assessed valuations, district financing, general obligation bonds, lend-leasing financing, etc., for candidate growth areas.
- Develop an information system to determine if facilities needs are being met in the County.

2. Goal - Coordination of Facilities Planning Programming and Implementation

Assure that facilities and services provided by all agencies and jurisdictions are coordinated in their timing, location, and level of service consistent with growth management goals and objectives.

- Coordinate the location and timing of public facility improvements with the programming of improvements by other jurisdictions and private parties to the degree that the facilities are interdependent or have direct impact on each other.

- Take all appropriate actions to assure that there is coordination in the expansion of major facilities by various serving agencies, consistent with the County General Plan and growth management goals and objectives.
- Integrate the County's fiscal policies with the General Plan and departmental Master Plans in a manner consistent with growth management goals.

3. Goal - Development of Flexible Programs

Provide a facilities program which, in its implementation, is capable of future adjustment or revision to meet changing needs and conditions.

- Periodically evaluate and update facilities plans in order to adjust to changing trends and needs.

ENVIRONMENTAL

1. Goal - Protection of Environmentally Significant Areas

Protect lands needed for vital natural processes, the managed production of resources, recreation, educational, and scientific activities.

- Protect lagoons and estuaries from urban encroachment, runoff, and sedimentation.
- Protect and maintain the supply of beach quality sand.
- To the maximum extent possible, keep flood-prone areas in their natural state.
- Identify and protect regionally significant deposits of construction quality sand and rock from urban encroachment.
- Maintain and preserve the existing watershed; groundwater integrity; vegetation and wildlife; outdoor recreation; scientific, educational, agricultural, archaeological, and open space values of the mountain, desert, beach and bluff areas of the County.

2. Goal - Conservation of Resources

Maximize efficient use of water and energy.

- Locate urban growth in order to minimize space heating and cooling requirements and reduce vehicle miles traveled.
 - Promote urban land uses, densities, and configurations that promote water conservation and are capable of being sustained during periods of reduced imported water supplies.
 - Promote reuse of wastewater in an energy-efficient manner.
 - Limit urban development to areas served by imported water.
 - Limit development in rural areas to levels that will not result in significant mining of groundwater resources.
3. Goal - Achievement of Air and Water Quality Standards
- Achieve and maintain mandated air and water quality standards.
- Encourage urban development patterns that will minimize transportation requirements; in particular, the number of automobile trips.

HOUSING

1. Goal - Provision of Sufficient Units
- Assist the private sector in the provision of sufficient housing units in the unincorporated area to accommodate the Board of Supervisors-endorsed population projections.
- Develop an information system to determine if housing needs are being met in the County.
2. Goal - Provision of Affordable Units
- Assist the private sector to assure that adequate, affordable shelter will be available to all socio-economic groups throughout the County.
- Reduce the cost of housing to consumers.
 - Provide adequate shelter for low income households throughout the County.

- Designate target areas in which low and moderate income housing is needed.
- Provide incentives or subsidies for construction of housing that is affordable to target populations.

SOCIAL

Goal

Encourage development of communities that are accessible to a mix of residents representative of the full range of age, income, and ethnic groups.

- Encourage balanced communities through the coordinated allocation of social services, public facilities, and designation of land uses in candidate growth areas.
- Use the special needs of target populations as a factor in identifying candidate growth areas.

ECONOMIC/FISCAL

1. Goal - Fiscal Viability

Assure the fiscal viability of local government through growth management while providing services that meet the standards contained in this plan.

- Optimize urbanized area tax base by supporting mixes of commercial, industrial, and residential uses.
- Encourage urbanization in areas where County expenditures and revenues generated can be balanced.

2. Goal - Fiscal Equity

Provide equitable service pricing and taxation policies which provide a reasonable relationship between levels of service, costs, and revenues.

- Minimize County-wide property tax burdens of growth-related expenditures.
- Determine costs for service delivery in order to guide adoption of policies to encourage self-supporting developments.

3. Goal - Annexation/Incorporation

Assure that urban communities are governed in a manner to provide maximum representation and efficient and equitable provision of public services. It is not the intent of this policy to provide urban services to unincorporated areas. Urban services may be administered by the County through County Service Areas when the full cost of such services is supported by the area being served rather than the County General Fund. The County General Fund will continue to support legitimate rural level services in rural areas. Provision of urban services to urban areas is not a proper role of County government. Legislation to implement this goal will be actively sought.

- Encourage and assist those unincorporated areas of the County which have urbanized to the point of requiring urban-level services to seek municipal status by either annexation to a city or incorporation.
- As an alternative to annexation or incorporation, use County Service Areas or alternative service agencies to recover the full cost of urban-level service.
- Limit expenditure and service levels in urbanized communities in the unincorporated area which do not choose to participate in County Service Areas.
- Provide adequate property and sales tax bases to encourage areas to annex or incorporate.

4. Goal - Regional Employment

Promote job opportunities for projected populations which minimize unemployment and return the maximum income to County residents.

- Reduce unemployment levels in the County, while respecting environmental and physical constraints.
- Propose incentive programs which may include subsidies to encourage desired location, size, and distribution of industrial and commercial development.
- Recommend local and state legislative proposals which will assist in achieving employment goals.

ADDITIONAL GOAL

THE COUNTY WILL DO ALL IT CAN TO COORDINATE WITH OTHER PLANNING ENTITIES IN THE REGION.

III. DISCUSSION

LAND USE

The concept of this goal is to concentrate urban development in and around existing urban communities and to retain the rural lifestyle and setting of the rest of the County. A major consideration is the protection of agricultural lands.

This concept is basic to the efficient provision of services, to the preservation of our diminishing land resources, and to the retention of the diverse life styles that make the County an attractive place to live.

CAPITAL FACILITIES

These goals and objectives deal with the following issues:

1. Provision and Phasing of Facilities

If growth is to be properly phased, serving agencies, including the County, must provide sufficient facilities on a timely basis to accommodate the growth. Further, the County, through its land use and planning authority, should encourage development patterns that permit efficient use and economical expansion of the facilities. Finally, the County should constrain growth if facilities necessary to health, safety, and welfare are unavailable or inadequate.

2. Coordination of Facilities Planning, Programming, and Implementation

Facilities plans should be coordinated to assure that decisions in the unincorporated area are consistent

with County plans and policies.

The facilities decisions of various serving agencies are interdependent and impact one another. In addition, decisions made by certain jurisdictions, especially independent special districts, impact land development patterns in the unincorporated area. Improved coordination of these decisions is necessary in order to effectively manage growth.

3. Development of Flexible Facilities Programs

In the interest of efficiency and economy, it is necessary to have the capability to modify facilities programs in the face of changing technology and service demand.

ENVIRONMENTAL

Environmental goals and objectives deal with protection of environmentally significant areas, conservation of resources, and achievement and maintenance of air and water quality standards.

The following environmentally significant areas have been identified as legitimate concerns of growth management:

- lagoons and estuaries
- flood-prone areas
- mountains and deserts

Growth management will focus on these areas because they have a direct bearing on the location of candidate growth areas. Other environmentally sensitive areas, such as archaeological sites, specific biological resources, and unique geological

formations are more appropriately protected through the Community Planning process and good site design practices.

HOUSING

The housing goals represent a commitment to do everything possible to meet projected housing needs dictated by projected population increases, to reduce the cost of housing, and to distribute affordable housing throughout the unincorporated area.

SOCIAL

This goal represents a commitment for growth management to support County community development goals and objectives. In particular, the needs of special "target populations" will be taken into account when identifying candidate growth areas, when determining future facilities requirements, and dealing with economic development needs of the region.

ECONOMIC/FISCAL

The economic/fiscal goals are concerned with the following issues:

1. Fiscal Viability

This term refers to the ability of local government to provide necessary services in a financially sound manner while giving due consideration to the ability of residents to pay for those services. This

can be accomplished by providing a balance between residential, commercial, and industrial land uses and the associated property tax base, an equitable mix of revenues between incorporated and unincorporated areas, and promoting urban development in geographic areas where expenditures and revenues can be balanced.

2. Fiscal Equity

Fiscal equity refers to the ability of local government to balance the costs of providing services with the level of those services for individual communities. This can be accomplished by using non-property tax revenues for growth-related expenditures when possible, promoting fiscally self-supporting developments and communities, and providing tax incentives to rural levels which do not receive urban services.

3. Annexation/Incorporation

Annexations and incorporations can be encouraged by minimizing cost/revenue transfers between communities through County Service Areas which recover the full cost of services provided. In addition, adequate property and sales tax bases can offset growth-related expenditures and make annexation or incorporation a fiscally sound option.

4. Balance Employment and Income Growth With Population Growth

A more balanced regional economy is desirable in view of our relatively high unemployment rate. Both jobs and additional personal income can be promoted

by improving the local business climate. This will involve incentives to attract new commercial and industrial firms and possible changes to State legislation affecting the California business climate.

APPENDIX II.

CANDIDATE GROWTH AREA SELECTION METHODOLOGY

A. Introduction

On August 18, 1977, the Board of Supervisors reviewed Progress Report No. 3 and approved the use of a Candidate Growth Area Selection Methodology. This methodology involves evaluating sub-units of the County in terms of those approved growth management objectives which are geographically sensitive.*

The methodology contained three basic components.

1. It identified 14 objectives approved for the Growth Management Study which are geographically sensitive.
2. It identified a non-numerical rating system which indicates the degree of compatibility with each objective.
3. It defined criteria which provide general indications of an area's ability to accommodate growth in a manner compatible with the selected objectives.

The geographical area of analysis used in the methodology was the Traffic Analysis Zone (TAZ)** or where appropriate, divisions of TAZ's.

In reviewing the methodology the Board of Supervisors made one major change. They directed that the availability of public transit be considered in the determination of the overall rating.

* A "geographically sensitive" objective means that to meet the intent of the objective growth should be directed to geographical areas with certain characteristics. Example: locate growth in areas where imported water is available.

** A Traffic Analysis Zone is a geographic unit developed by the California Department of Transportation to facilitate detailed regional studies. The size is based upon population and is generally half the size of a census tract.

B. Explanation of the Methodology

1. The objectives used in the methodology are as follows:

Land Use Objectives

Encourage Infilling or Contiguous Development,
Continue and Expand Agricultural Uses

Capital Facilities Objectives

Extend Facilities to Contiguous Areas

Direct Growth Where Facility Capacity Exists

Direct Growth Where the Provision of Public
Transit is Most Feasible

Environmental Objectives

Protect Environmentally Significant Areas from
Development

Minimize Requirements for Space Heating and Cooling

Locate Development Where Imported Water is Available

Minimize Transportation Requirements and Number of Trips

Housing Objectives

Increase the Availability of Low and Moderate Housing
in Deficient Areas

Social Objectives

Encourage New Development in Declining Socio-Economic
Areas

Annexation/Incorporation Objective

Encourage Development in Declining Socio-Economic Areas
Optimize Tax Base with Land Use Mix to Encourage Future
Incorporation

Urbanize Where County Expenditures and Revenues Balance

2. A Rating System was developed and approved by the Board. This system is non-numerical and has three basic categories. The ratings are:

Rating

- | | |
|---|---|
| + | Growth in this area is highly compatible with the objective and should be encouraged. |
| 0 | Growth in this area has a "neutral" impact upon the objective. |
| - | Growth in this area is not compatible with the objective and should be discouraged. |
| X | This area contains a fundamental restraint to development.* |

3. Criteria were developed for each objective. These criteria were used to determine the compatibility of areas with each objective. These criteria were used in testing for the objectives. The criteria are identified in Progress Report No. 3. New or modified criteria are included in Table I. For purposes of explanation one example is as follows:

- | | |
|-------------------|---|
| <u>Objective:</u> | Locate Development Where Facility Capacity Exists or Where Facilities Can Be Expanded Without Major New Facilities. |
| <u>Criteria:</u> | This single objective identified four Fundamental facilities which required separate analysis -- water, sewers, fire protection, schools. |

The criteria used for this objective were as follows:

- | | |
|---|---|
| + | Sufficient capacity exists (or is assured) for projected population in this area |
| 0 | While sufficient capacity does not exist, the facility could be feasibly expanded to accommodate the projected population |
| - | The population projections would require the construction of major new facilities |

* Example: The area is outside the boundaries of a water district supplying imported water; the area is a floodplain or lagoon, etc.

The Criteria were applied for each of the four facility types in terms of the three rating levels. Results of this analysis were then combined into an overall rating for the objective.

In terms of the criteria identified in Progress Report No. 3 changes occurred as follows:

- a. The criteria selected to indicate the existing or future availability of public transit were not included in the original report as the objective was added by the Board of Supervisors (see Table I for Criteria).
- b. Social criteria were further refined and modified through meetings with staff of the Human Resources Agency.

4. Evaluation by Traffic Analysis Zone (TAZ)

While the analysis addressed all of the incorporated area, the initial evaluation covers only the western third of the County. This is the area of the "208" population projections and the area subject to current urban development pressures.

A total of 291 TAZ's and SubTAZ's were included in the analysis.

The study then proceeded as follows:

- In accordance with the Board-approved objectives, TAZ's beyond the existing boundaries of a water district were identified. A total of 31 areas were excluded on the basis of having a fundamental restraint to development.
- All areas were evaluated in terms of 95 separate criteria. A total of 8,000 separate analysis were required to complete the analysis.
- After all 261 areas were evaluated, a composite score or overall rating was assigned to each.
- The overall ratings were then tested and evaluated to assure consistency and accuracy.

- TAZ's and SubTAZ's were combined to coincide with community plan and subregional boundaries.
- These larger units were given an overall rating, and the ratings once again tested for consistency and accuracy.

C. Summary of Results

The breakdown in terms of the 291 TAZ or SubTAZ studied is as follows:

- 104 Received an Overall Rating of Positive
- 48 Received an Overall Rating of Neutral
- 108 Received an Overall Rating of Negative
- 31 Were found to be beyond the existing boundaries of the San Diego County Water Authority and were thus excluded from further evaluation

URBAN DEVELOPMENT AREA SELECTION CRITERIA

POLICY AREA	OBJECTIVES	GROWTH WILL BE ENCOURAGED IN TAZ'S WHERE
Land Use	Infilling, contiguous urbanization Preserve and expand agricultural uses	40% to 80% of planned holding capacity has been reached. There is no potential for agricultural uses.
Capital Facilities	Fully utilized existing capacities Extend facilities to contiguous areas	Sufficient capacity exists for projected population. All fundamental facility services (water, sewer, fire protection and schools) exist. Second priority will go to areas with at least one service contiguous to service areas for remaining three facilities. Transit service exists currently, or current land use designations are compatible with future public transit provision.
Environmental	Protect lagoons, flood plains, sand, rock deposits, mountains and deserts Locate growth in temperate areas to reduce energy needs Limit development to areas where imported water is available Minimize transportation needs and trip frequency	Candidate growth areas will exclude certain such resources entirely. There are no environmentally sensitive areas within proximal to this TAZ. Average heating degree days are below 2,600. They lie within the boundaries of the County Water Authority. At least 40 acres of commercial and industrial land are available.
Housing	Increase low and moderate income housing availability	Residential densities average or exceed 7.3 dwelling units per acre. Priority will be given to areas over 14.5 average dwelling units per acre.
Social	Meet needs of Special Populations according to: - Socio-economic status - Employment availability - Economic stability	They lie within one of the census tracts ranking low socio-economically based on income, unemployment, welfare needs, occupational level and disease incidence. They lie proximal to one of the region's ten top employment generating Subregional Areas. They lie within census tracts relatively sensitive to changes in land use and economic conditions based on measures of mobility, homeownership, fixed incomes and growth rates.
Economic	Optimize tax base with land use mix to encourage incorporation Urbanize where County expenditures and revenues balance Encourage urbanized areas to annex	The ratio of commercial/industrial assessed valuation to total AV is above average. (Analysis still to be completed.) Per capita AV is above average for the County. (Analysis still to be completed.) They lie within the sphere of influence of an incorporated area and land use designations are compatible with the incorporating city's designations.

APPENDIX III. LAND USE

HOLDING CAPACITY ANALYSIS

Section A. Urban Development Areas

Urban Development Area Summary

URBAN DEVELOPMENT AREA	Holding Capacity		
	Community Plan	Urban Development Area	Population Goal/Projection
Escondido Fringe	25,200	16,800	--
Fallbrook	47,800	32,200	36,000
Lakeside	67,500	56,300	50,000
Montgomery	26,300	26,300	--
North County Metro	112,500	99,200	--
Poway	61,300	53,100	45,000
Ramona	40,900	24,800	28,500
San Dieguito	102,300	85,300	90,000
Santee	104,900	103,100	75,000
Sweetwater	13,300	13,300	20,000
Valle de Oro	<u>118,300</u>	<u>118,300</u>	94,000
TOTALS	720,300	628,700	

Escondido Fringe
Community Plan Area

Land Use Type	Existing Dwelling Units	Percent (%)	DCA*	Percent (%)	Total Dwelling Units	Percent (%)
Single Family						
1	230	6	2,250	43	2,480	28
2	883	23	--	--	883	10
3	855	23	--	--	855	10
4	391	10	--	--	391	4
5	1,344	36	--	--	1,344	15
Multiple Family						
6	38	1	--	--	38	--
7	9	--	--	--	9	--
8	--	--	--	--	--	--
Mobile Homes	--	--	--	--	--	--
Rural Categories	25	1	2,975	57	3,000	33
TOTAL	3,775	100	5,225	100	9,000	100

Existing Population:

$$3,775 \text{ DU} \times 3.1 \text{ People/DU} = 11,700$$

Ultimate Community Plan:

$$9,000 \text{ DU} \times 2.8 \text{ People/DU} = 25,200$$

Ultimate Urban Development Area:

$$6,000 \text{ DU} \times 2.8 \text{ People/DU} = 16,800$$

Population Projection/Goal = Not Applicable

Comments:

The Escondido Fringe Community Plan prohibits development at a density greater than one dwelling unit per acre--regardless of designated land use--until the area is annexed to the City of Escondido. The holding capacity analysis was made recognizing this constraint.

* DCA -- Development Capability Analysis -- This represents the estimated number of additional dwelling units that could be constructed within each land use category. The methodology employed in making these estimates is described in Chapter III, Section F, pages 29-31 of the Preliminary Plan.

Escondido Fringe

The trends in housing mix in the Escondido Fringe area are somewhat difficult to describe based upon the geographical aggregation of data. At present only one percent of the units in these areas are multiples. There are no mobilehome parks.

The future development in this area is proposed by the Escondido Fringe plan to be one dwelling unit per acre until annexation occurs. Therefore, the additional 2,250 units that could potentially be added to this growth area will be at low densities (one dwelling unit per acre), unless it is an existing lot.

The housing cost implications are that this area will remain prohibitive to all low or moderate income households.

Fallbrook H.C.A.
Community Plan Area

Land Use Type	Existing Dwelling Units	Percent (%)	DCA	Percent (%)	Total Dwelling Units	Percent (%)
Single Family						
1	57	1	--	--	57	0.4
2	450	7	2,121	20	2,571	
3	396	7	704	7	1,100	16
4	727	12	--	--	727	4
5	2,812	47	1,138	11	3,950	24
Multiple Family						
6	284	5	48	1	332	2
7	127	2	1,342	13	1,469	9
8	359	6	156	2	515	3
Mobile Homes	770	13	--	--	770	5
Rural Categories	37	1	4,886	46	4,923	30
TOTAL	6,019	100	10,395	100	16,414	100

Existing Population:

$$6,019 \text{ DU} \times 1.3 \text{ People/DU} = 18,700$$

Ultimate Urban Development Area:

$$11,491 \text{ DU} \times 2.8 \text{ People/DU} = 32,200$$

$$\text{Population Projection/Goal} = 36,000$$

Comments:

The holding capacity analysis does not include all of the Fallbrook Community Planning Area. The designated land use of that portion not analyzed is Rural Residential and therefore, does not affect the analysis of the Urban Development Area which consists entirely of urban land designations.

Fallbrook

The trends in housing mix in the Fallbrook area indicate between 1970 and 1977 there has been a slight decrease in the percentage of single family detached units from 78 percent to 71 percent and a slight increase in multiples (ten percent to 14 percent) and mobilehomes (12 percent to 14 percent).

Of the 2,536 units added in the Fallbrook SRA between 1970 and 1977, 58 percent were single family detached, 22 percent were multiple, and 20 percent were mobilehomes.

The holding capacity analysis indicates within the candidate growth area of Fallbrook an additional 5,509 units can be added. Approximately 1,546 units (28 percent) are contemplated at multiple residential densities. In the past seven years approximately 42 percent of the units added in the SRA were multiples or mobilehomes, thus the future housing mix will result in a higher proportion of single family detached homes to multiple units. However, the overall trend will continue in terms of housing mix within the community, that is, a reduced percentage of single family detached units and an increase in multiples.

At present, approximately 47 percent of the units in Fallbrook are at plan densities of 7.3 dwelling units per acre. The existing plan designates only eleven percent of the future single family units

at this medium density. The majority of the single family units will be at lower plan densities (20 percent at two dwelling units per acre and seven percent at 2.9 dwelling units per acre).

The lower densities in these single family areas will probably result in higher per unit land costs and therefore higher housing costs.

Lakeside
Community Plan Area

Land Use Type	Existing Dwelling Units	Percent (%)	DCA	Percent (%)	Total Dwelling Units	Percent (%)
Single Family						
1	316	2	--	--	316	1
2	1,116	9	--	--	1,116	5
3	1,595	12	--	--	1,595	7
4	1,370	10	3,430	32	4,800	20
5	3,577	27	--	--	3,577	15
Multiple Family						
6	710	5	--	--	710	3
7	550	4	2,066	19	2,616	11
8	586	5	1,454	13	2,040	8
Mobile Homes	3,344	25	--	--	3,344	14
Rural Categories	37	--	3,959	36	3,996	16
TOTAL	13,201	100	10,909	100	24,110	100

Existing Population:

$$13,201 \text{ DU} \times 3.1 \text{ People/DU} = 40,900$$

Ultimate Community Plan:

$$24,110 \text{ DU} \times 2.8 \text{ People/DU} = 67,500$$

Ultimate Urban Development Area:

$$20,114 \text{ DU} \times 2.8 \text{ People/DU} = 56,300$$

$$\text{Population Projection/Goal} = 50,000$$

Comments:

Precise holding capacity analysis of this area has been delayed pending completion of field surveys. The total dwelling units attainable for each category was determined by calculating the gross area for each category and estimating the yield from the acreage data. A revised analysis of this area will be completed by April 1978.

Lakeside

The trends in housing mix in the Lakeside area indicate that between 1970 and 1977 there has been a decline in the percentage of single family units from 78 percent to 64 percent of the total housing stock. During this period, mobilehomes increased from 14 percent to 24 percent of the total housing stock. Multiples increased from eight percent to 12 percent.

Of the 3,796 units added, 38 percent were single family, 18 percent were multiples, and 44 percent mobilehomes.

The holding capacity analysis indicates within the Lakeside urban development area an additional 6,950 units can be added. Approximately 3,520 units (52 percent) are contemplated at multiple residential densities. This is a lower percentage of units in multiples and mobilehomes than have been characteristic of the trend in the last seven years.

There appears to be continued opportunity for housing choice within the Lakeside Urban Development Area.

Montgomery H.C.A.
Community Plan Area

Land Use Type	Existing Dwelling Units	Percent (%)	DCA	Percent (%)	Total Dwelling Units	Percent (%)
Single Family						
1	5	--	--	--	5	--
2	47	1	--	--	47	1
3	96	1	--	--	96	1
4	456	6	--	--	456	5
5	2,166	27	303	21	2,469	26
Multiple Family						
6	490	6	--	--	490	5
7	135	2	381	28	516	6
8	2,977	37	714	51	3,691	39
Mobile Homes	1,615	20	--	--	1,615	17
Rural Categories	14	--	--	--	14	--
TOTAL	8,001	100	1,398	100	9,399	100

Existing Population:

$$8,001 \text{ DU} \times 3.1 \text{ People/DU} = 24,800$$

Ultimate Urban Development Area / Subregional Area

$$9,399 \text{ DU} \times 2.8 \text{ People/DU} = 26,300$$

$$\text{Population Projection/Goal} = \text{Not Applicable}$$

Montgomery

The Montgomery Urban Development Area is made up of portions of the SRA of Chula Vista and South Bay. The trends in housing mix indicate that the number of single family units as a percent of the total housing units has declined from 56 percent to 48 percent and 70 percent to 59 percent respectively between 1970 and 1977 (see tables 5, 6 and 7).

There are presently 7,987 units in this Urban Development Area, 5,217 or 65 percent of which are multiple units. The holding capacity analysis indicates that 1,398 units could be added within this urban development area. The existing plan indicates that approximately 78 percent of the units to be added will be multiple units.

It appears that this area has the potential to provide additional medium to higher density units which could potentially provide lower and moderate income housing.

North County Metro
Community Plan Area

Land Use Type	Existing Dwelling Units	Percent (%)	DCA	Percent (%)	Total Dwelling Units	Percent (%)
Single Family						
1	184	3	206	1	390	1
2	1,107	15	294	1	1,401	4
3	401	6	--	--		
4	494	7	--	--		
5	2,892	40	16,788	59	20,575	58
Multiple Family						
6	436	6	583	2	1,019	3
7	290	4	158	1	448	1
8	290	4	78	--	368	1
Mobile Homes	1,032	14	--	--	1,032	3
Rural Categories	16	--	10,190	36	10,206	29
TOTAL	7,142	100	28,297	100	35,439	100

Existing Population:

7,142 DU X 3.1 People/DU = 22,100

Ultimate for Region:

35,439 DU X 2.8 People/DU = 99,200

Population Projection/Goal = Not Applicable

Comments:

Precise holding capacity analysis of this area has been delayed pending completion of field surveys. The total dwelling units attainable for each category was determined by calculating the gross area for each category and estimating the yield from the acreage data. A revised analysis of this area will be completed by April 1978.

North County Metro

The trends in housing mix within the North County Metro are more difficult to explain because of the geographical aggregation of data. Since the North County Metro is not a contiguous unit the data in these areas include the Cities of San Marcos, Vista and Carlsbad. In all three SRA areas the trends in housing mix have indicated a reduction of single family units and an increase in multiples and mobilehomes.

At present, within the North County Metro area there are 7,142 dwelling units, 71.2 percent of which are single family detached. Additionally, there are 1,016 multiples and 1,032 mobilehomes.

The holding capacity analysis indicates that 18,107 units can be accommodated within the Urban Development Areas based on the adopted County General Plan. The housing mix proposed by the plan is 95.5 percent single family and 4.5 percent multiple.

Since single family detached units are more costly it appears that the predominance of single family over multiple family units will lead to increased housing costs.

Poway H.C.A.
Community Plan Area

Land Use Type	Existing Dwelling Units	Percent (%)	DCA	Percent (%)	Total Dwelling Units	Percent (%)
Single Family						
1	370	4	1,056	9	1,426	6
2	885	9	339	3	1,224	5
3	339	3	3,222	27	3,561	17
4	1,099	11	1,865	16	2,964	14
5	4,980	50	981	8	5,961	28
Multiple Family						
6	275	3	--	--	275	1
7	148	1	--	--	148	--
8	1,011	10	1,601	13	2,612	11
Mobile Homes	803	8	--	--	803	4
Rural Categories	15	1	2,916	24	2,931	14
TOTAL	9,925	100	11,980	100	21,905	100

Existing Population:

$$9,925 \text{ DU} \times 3.1 \text{ People/DU} = 30,800$$

Ultimate Community Plan Area:

$$21,905 \text{ DU} \times 2.8 \text{ People/DU} = 61,300$$

Ultimate Urban Development Area:

$$18,974 \text{ DU} \times 2.8 \text{ People/DU} = 53,100$$

$$\text{Population Projection/Goal} = 45,000$$

Poway

The trends in housing mix in the Poway area indicate between 1970 and 1977 there has been a slight decrease in the percentage of single family detached units from 87 percent to 83 percent and a slight increase in multiple units from six percent to ten percent. The remaining seven percent are mobilehomes.

The holding capacity analysis based on the adopted plan indicates that approximately the same distribution of single and multiple units could potentially exist in the future. The percentage of mobilehomes compared to the total units will decrease. The distribution of units by density classification will change significantly. The density in single family urban areas will decrease. At present, fifty percent of all units are in density classifications of 7.3 dwelling units per acre. Only eight percent of the developable land is planned at this density. There are no lands designated at densities that permit mobilehomes or townhouses (7 to 10 dwelling units per acre). The plan does provide for 13 percent of the future units to be at higher densities (greater than 15 units per acre), however, over 600 of those potential units are on a specific site that has definite development limitations (flood plain). The potential of units at higher densities will no doubt be lower than shown on the holding capacity table.

There seems to be little potential for low and moderate income housing in Poway based on the large percentages of land planned

at lower densities. Since the cost of land is becoming a larger percentage of the total cost of a dwelling unit it follows that housing costs in Poway in the future will be beyond the income limits of most moderate income households.

Community Planning Area

Land Use Type	Existing Dwelling Units	Percent (%)	DCA	Percent (%)	Total Dwelling Units	Percent (%)
Single Family						
1	416	12	240	4	656	7
2	925	27	3,280**	60	4,205	48
3	227	7	-	-	227	3
4	178	5	65	1	243	3
5	902	26	80	2	982	11
Multiple Family						
6	80	2	-	-	80	1
7	208***	6	-	-	208	2
8	164	5	102	2	266	3
Mobile Homes	284	8	-	-	284	3
Rural Categories	49	2	1,668	31	1,717	19
TOTAL	3,433	100	5,435	100	8,868	100

Existing Population (Towncenter and San Diego Country Estates only)

3,433 DU X 3.1 People/DU = 10,600

Ultimate Urban Development Area:

8,868 DU X 2.8 People/DU = 24,800

Population Projection/Goal = 28,500 (for entire Community Plan)

* Town Center and San Diego Country Estates only

** 3,000 DU from San Diego Country Estates

*** 200 DU from San Diego Country Estates

Ramona Population

The trends in housing in the Ramona area indicate little change between 1970 and 1977. The predominance of single family detached units (90% in 1970 to 89% in 1977) has continued. Within the Urban Development Areas, namely the towncenter and the existing subdivided San Diego Country Estates, there are 3,384 dwelling units, 78.2% of which are single family.

The holding capacity analysis indicates that within the Urban Development Areas and Country Estates approximately 3,767 units can be added, of which 97.2% will be single family detached. Approximately 3,000 of these units are already subdivided within Country Estates into 1/2 acre lots. There are, of course, numerous areas outside of the Urban Development Areas that are also subdivided. These are included in rural categories.

Since over 97% of the proposed housing units in Ramona are single family, the costs of housing in Ramona will probably increase in the future, for there is little potential for multiple unit development based upon the proposed plan.

San Dieguito H.C.A.
Total Community Plan Area*

Land Use Type	Existing Dwelling Units	Percent (%)	DCA	Percent (%)	Total Dwelling Units	Percent (%)
Single Family						
1	788	4	998	5	1,786	5
2	1,049	6	1,702	9	2,751	7
3	873	5	3,231	19	4,104	11
4	2,429	13	-	-	2,429	7
5	6,656	36	1,855	10	8,511	24
Multiple Family						
6	2,386	13	3,531	19	5,917	16
7	480	3	958	5	1,438	4
8	2,400	13	238	1	2,638	7
Mobile Homes	903	5	-	-	903	2
Rural Categories	333	2	5,743	32	6,076	17
TOTAL	18,297	100	18,256	100	36,553	100

Existing Population:

18,297 DU X 3.1 People/DU = 56,700

Ultimate Urban Development Area:

30,477 DU X 2.8 People/DU = 85,300

Ultimate Community Plan:

36,533 DU X 2.8 People/DU = 102,300

Population Projection/Goal:

= 90,000

Comments:

The holding capacity analysis for this area was based upon the allowable uses and densities for undeveloped property consistent with the San Dieguito Community Plan. The Coastal Commission, which provided additional regulation of development for the area west of El Camino Real, has encouraged agricultural uses in some designated residential areas and lower than permitted densities in other residential areas. For this reason the estimate of the total population that could be accommodated within the Urban Development Area is probably "optimistic", especially with respect to the number of residential units in the Medium, Medium High, and High residential land use categories.

*Does not include TAZ 6,403 (most of this TAZ is in Escondido Fringe Community Plan Area).

San Dieguito

The trends in housing mix in the San Dieguito area indicate between 1970-77 there has been a substantial increase in the number of multiple units. Many of these units have been condominiums. The percentage of single family units declined from eighty percent to sixty-one percent of the total units between 1970 and 1977. Multiple units increased from fifteen percent to thirty-five percent of all the units. Mobilehomes decreased from five percent to four percent of the total units.

At present, thirty-six percent of the single family units are in plan categories that permit 7.3 dwelling units/acre. Only ten percent of the future units are proposed at this density. At present fourteen percent of the urban lands are at densities from one dwelling unit/acre to 2.9 dwelling units/acre. The existing plan indicated that thirty-three percent of the future units added will be at these lower densities.

The existing plan provides for twenty-five percent of the future units will be at multiple family densities. At present, twenty-nine percent of the existing units are at these densities. Additionally, thirteen percent of the existing units are at densities in excess of fifteen dwelling units/acre. Only one percent of the future units are proposed at this density.

All of the proposed medium and higher density development in the San Dieguito area is subject to Coastal Commission review. The

Coastal Commission actions could further reduce the holding capacity shown in the attached tables. The local Coastal Plan which will be prepared by 1981 could impact the proposed densities.

In the San Dieguito area, there will be fewer lands available at medium and higher densities than currently exist today. The impact on lower and moderate income housing will be substantial. At the lower densities proposed on the plan the land costs per unit will increase to the point that any lower or moderate income housing will be significantly limited.

Santee

Community Planning Area

Land Use Type	Existing Dwelling Units	Percent (%)	DCA	Percent (%)	Total Dwelling Units	Percent (%)
Single Family						
1	30	-	-	-	30	-
2	177	1	-	-	177	-
3	385	3	-	-	385	1
4	929	6	279	1	1,208	3
5	8,020	55	7,288	32	15,308	41
Multiple Family						
6	158	1	-	-	158	-
7	1,569	11	7,353	32	8,922	24
8	-	-	7,320	32	7,320	20
Mobile Homes	3,318	23	-	-	3,318	9
Rural Categories	-	-	634	3	634	2
TOTAL	14,586	100	22,874	100	37,460	100

Existing Population:

14,586 DU X 3.1 People/DU = 45,200

Ultimate Community Plan:

37,460 DU X 2.8 People/DU = 104,900

Ultimate Urban Development Area:

36,826 DU X 2.8 People/DU = 103,100

Population Goal/Projection = 75,000

Comments:

Precise holding capacity analysis of this area has been delayed pending completion of field surveys. The total dwelling units attainable for each category was determined by calculating the gross area for each category and estimating the yield from acreage data. A revised analysis of this area will be completed by April 1978.

Santee

The trends in housing mix in the Santee Sub-Regional Area indicate between 1970 and 1977 a slight decrease in the percentage of single family dwellings. In 1970, 75% of the dwelling units were single family while in 1977 70% were single family detached units. In 1970, multiples accounted for 3% of the units, mobile homes for 22%, while in 1977 the division between multiples and mobile homes was 9% and 18% respectively.

Of the 5,781 units added between 1970 and 1977 70% were single family, 15% multiples, and 15% mobile homes. The Santee Urban Development Area has more existing dwelling units because it includes some units that are in the El Cajon Sub-Regional Area for statistical purposes.

The holding capacity analysis indicates that 22,240 additional units could be added to this Urban Development Area. The mix of these units is proposed to be 34% single family and 66% multiple and mobile home.

There appears to be ample land available for medium and higher densities in the Santee Community Growth Area to accommodate a wide range of housing types.

Sweetwater
Community Planning Area

Land Use Type	Existing Dwelling Units	Percent (%)	DCA	Percent (%)	Total Dwelling Units	Percent (%)
Single Family						
1	121	4	690	44	811	17
2	717	22	244	16	961	20
3	514	16	-	-	514	11
4	897	28	20	1	917	19
5	728	23	-	-	728	16
Multiple Family						
6	94	3	-	-	94	2
7	61	2	-	-	61	1
8	60	2	46	3	106	2
Mobile Homes	-	-	-	-	-	-
Rural Categories	5	-	563	36	568	12
TOTAL	3,197	100	1,563	100	4,760	100

Existing Population:

$$3,197 \text{ DU} \times 3.1 \text{ People/DU} = 9,900$$

Ultimate Community Plan and Urban Development Area:

$$4,760 \text{ DU} \times 2.8 \text{ People/DU} = 13,300$$

$$\text{Population Projection/Goal} = 20,000$$

Sweetwater

The trends in housing mix in the Sweetwater area indicate very little change in the housing stock. In 1970, 99% of the units were single family, while in 1977, 95% were single family. Multiple (2%) and mobile home (3%) accounted for the remainder of the units.

The holding capacity indicates that approximately 1,000 additional units can be added within the Sweetwater Urban Development Area. The mix of these additional units will be similiar to the existing housing mix (95% single family - 5% multiple).

There appears to be limited housing choice in Sweetwater because the majority of units proposed in the candidate growth area are single family detached.

Valle De Oro
Community Planning Area

Land Use Type	Existing Dwelling Units	Percent (%)	DCA	Percent (%)	Total Dwelling Units	Percent (%)
Single Family						
1	495	2	33	-	528	1
2	2,723	14	2,487	11	5,210	12
3	1,867	9	-	-	-	-
4	3,052	15	5,084	23	10,003	24
5	8,098	41	477	2	8,575	20
Multiple Family						
6	864	4	-	-	-	-
7	1,509	8	4,701	21	7,074	17
8	-	-	8,682	39	8,682	21
Mobile Homes	1,361	7	500	2	1,861	4
Rural Categories	10	-	318	2	328	1
TOTAL	19,979	100	22,282	100	42,261	100

Existing Population:

$$19,979 \text{ DU} \times 3.1 \text{ People/DU} = 61,900$$

Ultimate Community Plan Area:

$$42,261 \text{ DU} \times 2.8 \text{ People/DU} = 118,300$$

Ultimate Urban Development Area:

$$42,261 \text{ DU} \times 2.8 \text{ People/DU} = 118,300$$

$$\text{Population Projection/Goal} = 94,000$$

Comments:

Precise holding capacity analysis of this area has been delayed pending completion of field surveys. The total dwelling units attainable for each category was determined by calculating the gross area for each category and estimating the yield from acreage data. A revised analysis of this area will be completed by April 1978.

Valle De Oro

The trends in housing mix in the Valle De Oro area are probably best reflected by the trends in the Spring Valley Sub-Regional Area.

Although the boundaries of the Urban Development Area and the Spring Valley Sub-Regional Area are not identical the information is valid.

In 1970, 85% of the 8,876 dwelling units were single family detached. Multiples constituted 6% and mobile home 9% of the remaining units.

In 1977, 75% of the units were single family, 15% multiple, and 10% mobile home. Within the candidate growth area 81% of the units were single family based upon a more precise count of existing development.

Between 1970-77 of the 4,210 units added, 54% were single family, 35% multiple, and 11% mobile homes.

The holding capacity analysis indicate sufficients land available to accommodate 21,964 units. The mix between these added units is 37% single family and the remaining 63% multiple or mobile home.

The potential for a wide range of housing choice seems possible in the Valle De Oro plan. Many of these areas for proposed medium and higher densities are within the Rancho San Diego development.

Section B. Estate and Rural Areas

Precise holding capacity analysis of the estate and rural areas has been delayed pending completion of field surveys. The total dwelling units attainable for each category was determined by calculating the gross area for each category and estimating the yield from average data. A revised analysis of this area will be completed by April 1978.

COMMUNITY PLANNING AREA	EXISTING POPULATION			ULTIMATE COMMUNITY PLANNING AREA			ULTIMATE URBAN DEVELOPMENT AREA			POPULATION PROJECTION/GOAL	COMMENTS
	Dwelling Units (DU)	People Per DU		Dwelling Units (DU)	People Per DU		Dwelling Units (DU)	People Per DU			
Alpine	680	X 3.1 =	2,100	5,078	X 2.8 =	14,200 ¹	N/A			10,750 including Country Town	See Alpine Country Town
Central Mountain	780	X 3.1 =	2,420	2,300	X 2.8 =	6,450 ²	N/A			Not Available	See Descanso, Guatay and Pine Valley Country Towns.
Crest/Dehesa	2,716	X 3.1 =	8,420 ²	5,791	X 2.8 =	16,215	770	X 2.8 =	2,150	Not Available	See Crest and Harbison Country Towns.
Desert	150	X 3.1 =	465	9,430	X 2.8 =	26,400	N/A			None	See Desert Special Study Area.
Fallbrook	1,500	X 3.1 =	4,650	5,586	X 2.8 =	15,640	N/A			36,000 including CGA	See Fallbrook CGA discussion.
Jamul/Dulzura	900	X 3.1 =	2,790	5,500	X 2.8 =	15,400 ²	N/A			Not Available	See Jamul Country Town.
Julian	290	X 3.1 =	900	2,860	X 2.8 =	8,000 ²	N/A			3,000 including Country Towns	See Julian Country Town.
Mountain Empire	1,075	X 3.1 =	3,300	4,086	X 2.8 =	11,400 ²	N/A			None	See Campo, Jacumba and Morena Lake Country Towns.
North County Metro	1,400	X 3.1 =	4,340	4,740	X 2.8 =	13,300 ³	N/A			Not Available	See North County Metro CGA.
North Mountain	500	X 3.1 =	1,550	4,935	X 2.8 =	13,800 ²	N/A			None	See Warner Springs Country Town.
Otay	800	X 3.1 =	2,480	2,700	X 2.8 =	7,560	N/A			Not Available	See Otay Mesa Special Study Area.
Pala/Pauma	700	X 3.1 =	2,170	3,500	X 2.8 =	9,800	800	X 2.8 =	2,240	Not Available	See Pauma Country Town.
Pendleton/DeLuz	200	X 3.1 =	620	1,500	X 2.8 =	4,200	N/A			Not Available	
Rainbow	260	X 3.1 =	800	2,150	X 2.8 =	6,000 ²	N/A			6,000 including Country Town	See Rainbow Country Town.
Ramona	580	X 3.1 =	1,800	5,750	X 2.8 =	16,100 ⁴	N/A			28,500 including CGA and San Diego Country Estates	See Ramona CGA.
Valley Center	650	X 3.1 =	2,000	5,960	X 2.8 =	16,700 ²	180	X 2.8 =	500	10,000 including Country Town	See Valley Center Country Town.

Footnotes: 1. Excluding Townsite.
2. Excluding Country Towns.
3. Excluding North County Metro CGA.
4. Excluding Ramona CGA.

Section C. Country Towns

Precise holding capacity analysis of the Country Towns has been delayed pending completion of field surveys. The total dwelling units attainable for each category was determined by calculating the gross area for each category and estimating the yield from acreage data. A revised analysis of this area will be completed by April 1978.

COUNTRY TOWN	EXISTING POPULATION			ULTIMATE TOWNSITE AREA			ULTIMATE URBAN DEVELOPMENT AREA			POPULATION PROJECTION/GOAL	COMMENTS
	Dwelling Units (DU)	People Per DU		Dwelling Units (DU)	People Per DU		Dwelling Units (DU)	People Per DU			
Alpine	800	X 3.1 =	2,500	2,600	X 2.8 =	7,230	N/A			None	See Alpine CPA.
Campo	90	X 3.1 =	280	120	X 2.8 =	335	N/A			None	See Mountain Empire CPA.
Crest	390	X 3.1 =	1,200	420	X 2.8 =	1,170	N/A			None	See Crest/Dehesa CPA.
Descanso	170	X 3.1 =	530	380	X 2.8 =	800	N/A			None	See Central Mountain CPA discussion.
Guatay	70	X 3.1 =	225	100	X 2.8 =	275	N/A			None	See Central Mountain CPA.
Harbison	260	X 3.1 =	800	525	X 2.8 =	1,470	N/A			None	See Crest/Dehesa CPA.
Jacumba	100	X 3.1 =	300	135	X 2.8 =	380	N/A			None	See Mountain Empire CPA.
Jamul	500	X 3.1 =	1,550	800	X 2.8 =	2,240	N/A			None	See Jamul/Dulzura CPA.
Julian	100	X 3.1 =	2,450	875	X 2.8 =	2,450	N/A			None	See Julian CPA.
Morena Lake	235	X 3.1 =	730	900	X 2.8 =	2,520	N/A			None	See Mountain Empire CPA
Pauma	200	X 3.1 =	620	1,825	X 2.8 =	5,110	N/A			None	See Pala/Pauma CPA.
Pine Valley	180	X 3.1 =	550	300	X 2.8 =	925	N/A			None	See Central Mountain CPA.
Rainbow	450	X 3.1 =	1,400	1,500	X 2.8 =	4,300	N/A			None	See Rainbow CPA.
Valley Center	650	X 3.1 =	2,000	1,090	X 2.8 =	3,050	N/A			None	See Valley Center CPA.
Warner Springs	25	X 3.1 =	80	70	X 2.8 =	200	N/A			None	See North Mountain CPA.

Section D: Special Study Areas

Precise holding capacity analysis of the Special Study Areas has been delayed pending completion of field surveys. The total dwelling units attainable for each category was determined by calculating the gross area for each category and estimating the yield from acreage data. A revised analysis of this area will be completed by April 1978.

Desert Special Study Area

Existing Population:

$$490 \text{ DU's} \times 3.1 \text{ People/DU} = 1,500$$

Ultimate Special Study Area:

$$3,200 \text{ DU's} \times 2.8 \text{ People/DU} = 9,000$$

Population Projection/Goal:

None

Otay Mesa Special Study Area

Existing Population:

$$35 \text{ DU's} \times 3.1 \text{ People/DU} = 100$$

Ultimate Special Study Area:

$$26,900 \text{ DU's} \times 2.8 \text{ People/DU} = 75,300$$

Population Projection/Goal:

None

APPENDIX IV. A.

INTEGRATED FACILITIES ADEQUACY ANALYSIS SYSTEM

The Integrated Facilities Adequacy Analysis System (IFAAS) is the key phasing mechanism of the Growth Management Plan. The purpose of the system is to assure that the four fundamental facilities (water, sewers, fire, and schools) will be available prior to or concurrently with growth. The system consists of the Facilities Adequacy Matrix, the Facilities Adequacy Policy, and relies upon the information developed by the Growth Information System. IFAAS is proposed to quickly and systematically identify those areas which have sufficient capacity for all fundamental facilities to accommodate growth. It will be instrumental to the decision-making process for discretionary permits and will serve as progressive warning of facility deficiencies for the service agencies, the County, developers, and the public.

APPENDIX IV. A. 1.

FACILITIES ADEQUACY MATRIX (FAM)

The FAM incorporates definitions of the various levels of user demands on the fundamental facilities and proposes a performance rating for the agencies providing these services. The Facilities Adequacy Policy makes use of these ratings to "trigger" advisory actions on the part of the agencies providing the service and other actions within the responsibility of the Board of Supervisors.

There are many operational standards which pertain to the provision of the fundamental services and facilities identified by the Growth Management Program. These standards are either mandated by law (i.e., the requirement for secondary treatment of municipal sewage) or are projections of the ultimate per capita demands on the systems by 1995. In either case these standards, which enable analysis of long-term system deficiencies, are not appropriate for monitoring growth and evaluating its short-term impacts. Of prime importance for policy is information concerning the ability of any facility to accommodate short-term growth. It is proposed, therefore, that the Facility Adequacy Matrix (FAM) deal exclusively with the critical limiting capacities of each agency providing a fundamental service and the existing user demands upon these systems.

A basic responsibility of all agencies providing the fundamental services (sewer, water, fire protection, and schools) is to

provide service to existing and potential users upon demand. Any system which seeks to identify if sufficient capacity exists to accommodate growth should be based upon the actual realized demands upon the system rather than arbitrary long-term projections of the demand. To do otherwise would, in many cases, result in denial of service to new users while unused system capacity exists.

In order to develop a rating system for fundamental facilities and services the various levels (A through I) of potential demand for sewer, water, and school districts were defined. Service Demand Level A refers to the demands placed on the district by current users only. Level of Service I refers to the potential demand placed on the system by complete build-out in the district's ultimate service area.

The characteristics of fire protection do not lend themselves to the analysis of district capacity in the manner of the other fundamental facilities. Growth Management staff and the County Fire Services Coordinator have developed fire protection standards which address the level of service in the various land use categories and which can be used to develop ratings comparable to the other fundamental facilities.

The fire protection standards and ratings and a detailed description of the rating system for sewer, water, and school district are contained in section A of the Facilities Adequacy Policy (Appendix IV. A. 2.).

Consideration of Assured Facilities:

Because of the extended project development time for realization of increased capacities, it is proposed that the rating system defined above allow for "assured" facilities and "assured" increased capacities. The designation of future facilities and capacity increases shall be made by the affected agency when it is certain that the County may rely on the future "existence" of the capacity when approving development within the agency's jurisdiction. This realization of assured capacity will facilitate orderly development of areas and help eliminate the "boom-or-bust" growth cycle which adversely impacts the community, the County, and the developers.

This process of recognizing assured capacity is based upon the traditionally extended period of private project development. In the past the development of major subdivisions has required eighteen months (and more) from initial filing of maps to construction. Therefore, the designation of "assured" capacity by any agency should address the question -- will the capacity be realized before the demand? Certain steps in the development of capital improvement projects should be used by the agencies in this determination.

These include, but are not limited to:

1. Secured funding for the project;
2. Secured grants;
3. Voter approval of all necessary bonds;
4. All permits and clearances required for construction have been obtained.

When an agency has notified the County that there is additional capacity available due to "assured facilities", the agency's growth accommodation rating will be changed to reflect the assured increase in capacity. In addition, all agencies will notify the County of all reratings of facilities or interim measures which would result in an increase in the agency's critical capacity. These reratings may be the result of changes in operational methods, implementation of new physical processes, or the adoption of new service standards within the agency's jurisdiction.

Rating Areas:

A significant problem to any evaluation of the capacities for different services is one of service area and jurisdiction. Within some of the Urban Development Areas there are two or more agencies providing the same service. Furthermore, the existing boundaries of the various agencies are rarely coterminus. Therefore, the Facility Adequacy Matrix ratings will be applied to "Common Service Areas". These areas will be obtained by overlaying the existing boundaries for all sewer, water, fire protection, elementary school and high school districts. This methodology will enable all interested parties to quickly estimate the growth impacts and potential for any specific geographical area.

Miscellaneous Facility Ratings:

For specific subareas of the County it is possible that the proposed facility adequacy ratings are not directly applicable. This is generally true for those portions of the urban area designated for

growth between 1985 and 1995. In these areas, the rating of FDA (Future Development Area) will be entered in the Matrix. A rating of FDA (Future Development Area) will be entered in the Matrix. A rating of FDA would indicate the development of the area is constrained as described in "Urban Development Area - 1995" (Volume I - page 22).

In addition, it is possible, due to localized facility limitations, that a servicing agency may not be able to provide its service until completion of a capital improvement project, regardless of that agency's overall capacity rating. It will be the responsibility of each agency to delineate these areas will receive a rating in the matrix of Temporary Non-Service Areas (TNA). All subdivision approvals within areas designated TNA should be conditioned upon the completion of the improvement project or alternate means of providing the service.

In the growth management categories of Estate, Rural and Country Towns it is possible that sewers cannot and should not be required. In addition, the availability of groundwater, rather than the imported water, is the basic constraint in the rural areas. These areas will contain the following ratings in the Facility Adequacy Matrix:

SEP. . . . This area is not designated for sewers. Subdivisions in this area should be conditioned upon the feasibility of alternate means of waste disposal, i.e., septic systems.

GWP. . . . This area is to be subdivided and developed only to an extent limited by the availability of groundwater. (See Groundwater Policy - Appendix V)

FACILITY ADEQUACY MATRIX

(Sample)

CGA/Common Service Area		Sewer	Water	Fire	Schools
Poway #1		IV	II	I	III
Poway #2		IV	II	III	III
Valle de Oro #1		IIA*	I	I	II
Valle de Oro #2		IIA	I	I	II
#5		II	I	I	II

*Subscript "A" indicates rating based upon "assured" capacity as reported by the servicing agency.

APPENDIX IV. A. 2.

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FACILITIES ADEQUACY POLICY

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Purpose

To establish a policy to insure that fundamental public services will be available concurrently with the realization of the demands resulting from orderly growth within the unincorporated area. The facilities and services for which adequate capacity is required prior to or concurrently with growth are: sewage system, water supply, structural fire protection and schools.

Background

While the provision of the fundamental services within the unincorporated area in San Diego County is the responsibility of approximately 120 dependent and independent special districts, the responsibility for approving subdivisions and issuing building permits rests with the County. Currently the information required to make decisions concerning the approval of developments is provided on a case-by-case basis from the impacted service agencies. Due to the extended period of private project development it is possible that projects which have received "capacity availability" letters could be impacted by moratoria during the final approval process. In order to lessen the possibility of this occurrence and to provide adequate warning of impending facility deficiencies, an Integrated Facility Adequacy Analysis System (IFAAS) is being developed for San Diego County.

IFAAS consists of two components: an expanded Growth Information System and the Facilities Adequacy Matrix. The Growth Information System will be revised to contain all information necessary to determine:

1. The existing and projected demands for each district providing a fundamental public service; and
2. The critical or limiting capacity of the district.

The Facilities Adequacy Matrix will contain a rating indicating each district's ability to accommodate the various levels of projected service demand. For sewer, water and school districts a performance rating of I (one) indicates the agency has sufficient capacity to accommodate full development within its jurisdiction (or sphere of influence) consistent with the land use designations in the San Diego County General Plan and the Regional Growth Management Plan. A performance rating of X (ten) indicates the district has insufficient capacity to accommodate existing demands. The rating system for fire protection districts identifies existing and potential areas where the County's fire protection standards have been attained. The precise definition of all facilities ratings is contained in Section A of this policy.

In any facility system with fixed capacities, growth within the system's service area will result in a diminished potential to accommodate additional growth and subsequently, a lower performance rating. In order to fulfill the Board of Supervisor's land use responsibilities and to

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ensure the public health, safety and welfare, this Facilities Adequacy Policy defines the necessary actions of the County and special districts in terms of continuously changing relationships between capacity, demands and standards.

Policy

It is the policy of the Board of Supervisors that the following actions be performed by the County and/or requested of special districts based upon the performance ratings of:

1. Sewering Agencies
2. Water Supply Agenices
3. Fire Protection Districts
4. School Districts

A. Definitions

Levels of Service Commitment and Demand - for Sewers, Water and Schools: (all demands to be estimated on existing per-unit demand factors for the effected agency)

LevelDefinition

- | | |
|---|--|
| A | Current users - this is actual demand realized by the service agency. This demand will be expressed in terms of the number of existing users and the corresponding unit demands upon the system. |
| B | Vested users - this is the additional system demands represented by prospective users who have paid for the service but who are not yet utilizing the service. An example of a fully vested user is a subdivision which has purchased permits which allow connection to the system but the units are either under construction or awaiting sale (not applicable to school district). |
| C | Preferential users - this level of demand includes potential users which are not currently using the system but because they are in a district have been contributing to the funding of the system. Examples of preferential users include structures in sanitation districts which are on septic systems and/or in water districts and have private wells. |
| D | Final maps - this level of demand includes all potential units which could be constructed as a result of recorded subdivision maps and parcel maps (excluding demand accounted for in level B). |

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E	Approved maps - this level of demand includes all subdivision and parcel maps which have been approved by the appropriate agency but not yet recorded or granted final approval.		
F	Pending maps - this level of demand includes all subdivision and parcel maps which have been submitted for processing but which have yet to receive initial approval.		
G	Miscellaneous Demand - this demand involves an estimate of the number of potential users which can apply for or demand service without entering the subdivision review process and are not accounted for in commitment levels A through F. This would primarily consist of "old" legal building sites which have not been accounted for previously. It is proposed that the estimate of this demand be made for each district for a three-year period based upon the record of such activity during the previous three years.		
H	Build-out of 1985 growth area - this is the demand represented by subdivision and development of all subdividable parcels within the area designated for growth by 1985. By definition, this demand does not include the demands contained in any of the previously defined demand levels, and is estimated based upon community plan/general plan designations.		
I	Build-out of the 1985-95 area - this is an estimate of the demand represented by build-out of the 1985-95 area based upon the community plan/general plan designations and as in Level H (above) does not include any demand contained in Levels A through G.		
Each sewer, water and school agency will be assigned a rating which indicates the ability of the agency to accommodate the defined levels of service demand. This rating will be based upon critical existing capacity of the entire district as determined by the affected agency. For example, in a sanitation district the limiting capacity on growth could be: a. The rating capacity of treatment/reclamation facilities b. The physical capacity of major land outfalls c. The contractual capacity rights in a regional sewerage system It will be the responsibility of each sewer, water and school agency to define its critical capacity and to advise the County of any changes to that limiting capacity due to future capital improvement projects.			

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Agency Rating
Sewer, Water
and Schools

- | | |
|------|--|
| I | The critical capacity of the agency is sufficient to accommodate all existing and future service demands Levels A through I. |
| II | The critical capacity of the agency is sufficient to accommodate all existing and future service demands Levels A through H. |
| III | The critical capacity of the agency is sufficient to accommodate only the existing and future service demand levels A through G. |
| IV | The critical capacity of the agency is sufficient to accommodate only the existing and future service demand levels A through F. |
| V | The critical capacity of the agency is sufficient to accommodate only the existing and future service demand levels A through E. |
| VI | The critical capacity of the agency is sufficient to accommodate only the existing and future service demand levels A through D. |
| VII | The critical capacity of the agency is sufficient to accommodate only the existing and future service demand levels A through C. |
| VIII | The critical capacity of the agency is sufficient to accommodate only the existing and future service demand levels A and B. |
| IX | The critical capacity of the agency is sufficient to accommodate only the existing service demand (level A). |
| X | The critical capacity of the agency is insufficient to accommodate the existing service demand (level A). |

Fire Protection Ratings

The characteristics of fire protection do not lend themselves to the analysis of district capacity in the manner of the other fundamental facilities. The Growth Management Program and the County Fire Services Coordinator have developed fire protection standards which address the level of service in the various growth management categories and which can be used to develop ratings comparable to the

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other fundamental facilities. These ratings are based upon maximum average response time, the adequacy of water supply, the staffing and the jurisdiction of the fire protection districts.

Fire Protection Standards

Growth
Management
Category

Standards

Urban Structural fire protection provided by an independent fire protection district staffed by full-time paid personnel, a minimum recognized water supply capable of delivering 1,000 gallons per minute for one hour in addition to the maximum daily consumption rate during the past three years, and a maximum average response time of five minutes.

Estate Structural fire protection provided by an independent fire protection district, staff may be comprised of volunteer personnel (however, the employment of one paid person, eight hours a day, is encouraged), a minimum recognized water supply capable of delivering 500 gallons per minute for one hour in addition to the maximum daily consumption rate during the past three years, and a maximum average response time of seven minutes.

Rural Structural fire protection may be provided by a wholly volunteer fire department (however, the employment of one paid person, eight hours a day, is encouraged), and a maximum average response time of seven minutes.

Fire Protection
Agency Rating

- | | |
|-----|--|
| I | The response time, water availability, staffing and jurisdictional standards commensurate with the growth management category are fully realized in this area. |
| II | The response time, water availability and staffing standards commensurate with the growth management category are fully realized, however, annexation to (or contract with) an independent fire protection district is required before services are available. |
| III | The response time, water availability and staffing standards commensurate with the growth management category cannot be realized with existing facilities; however, elimination of deficiencies has been assured by the district. |

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- IV The response time, water availability and staffing standards commensurate with the growth management category cannot be realized with existing facilities, and elimination of deficiencies has not been assured.

B. Performance Ratings and Actions

1. Sewering and Water Supply Agencies

<u>Performance Rating</u>	<u>Action Type</u>	<u>Action Description</u>
I	No Action Necessary	
II	No Action Necessary	
III	Precautionary/ Advisory	The affected agency shall be requested to file a report with the Board of Supervisors indicating plans and schedules for facility expansion and a description of interim measures (such as rerating of treatment facilities or requests for additional capacity in regional facilities) which could be implemented. If the affected agency fails to file this report, the Board of Supervisors shall determine if there is sufficient information available to continue the acceptance of new tentative maps, tentative parcel maps, and special use permits within the agency's jurisdiction. The Board of Supervisors after review of the affected agency's report, shall consider the imposition of a moratorium on the acceptance of new tentative maps, tentative parcel maps and permits in process may continue to be processed.
IV	Mandatory	The Board of Supervisors shall consider the imposition of a moratorium on the acceptance of new

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		tentative maps, tentative parcel maps, and special use permits. Those maps and permits in process may continue to be processed.
V	Mandatory	The Board of Supervisors shall consider a moratorium on further approval of tentative maps, tentative parcel maps, and special use permits and the acceptance of new maps within the jurisdiction of the affected agency.
VI	Precautionary/ Advisory	The affected agency shall be requested to file a report with the Board of Supervisors detailing all efforts to develop capital improvement projects to alleviate the deficiency and showing alternatives to a total subdivision moratorium.
VII	Mandatory	The Board of Supervisors shall consider a moratorium on the recording of all maps and the acceptance and approval of subdivision maps.
VIII	No Action Proposed	
IX	Mandatory	The Board of Supervisors shall consider imposition of a moratorium of the issuance of all building permits and the approval or acceptance of subdivision maps.
X	Mandatory	The Board of Supervisors shall impose a moratorium on all building permits and the acceptance and approval of subdivision maps within the jurisdiction of the affected agency which would require service until such time as adequate capacity is available.

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2. School Districts

<u>Performance Rating</u>	<u>Action Type</u>	<u>Action Description</u>
I	No Action Necessary	
II	No Action Necessary	
III	Precautionary	The affected school district shall file a report with the Board of Supervisors indicating plans and schedules for school expansions and/or new school construction. In addition this report shall contain a description of all interim measures and reasons for their adoption or rejection, which could result in a rerating of the district's total capacity. These measures may include, but are not limited to: a. Temporary buildings b. Bussing c. Double sessions d. Extended day programs e. Year-round school attendance f. Open enrollment g. Elimination of low priority uses h. Increasing the tax rate (within limitations imposed by the California Revenue and Taxation Code).
IV	Mandatory	The Board of Superviosrs shall consider the imposition of a moratorium on the acceptance of new tentative maps, tentative parcel maps, and special use permits. Those maps and permits in process may continue to be processed.
V	Mandatory	The Board of Supervisors shall consider a moratorium on further approval of tentative maps, tentative parcel maps, and special use permits and the acceptance of new maps within the jurisdiction

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Performance
RatingAction
TypeAction
Description

of the affected district.

VI

Precautionary/
Advisory

The affected district shall file a report with the Board of Supervisors detailing all efforts to develop capital improvement projects to alleviate the deficiency and showing alternatives to a total subdivision moratorium.

VII

Mandatory

The Board of Supervisors shall consider a moratorium on the recording of all final maps and the acceptance and approval of subdivision maps.

VIII

No Action
Proposed

IX

Mandatory

The Board of Supervisors shall consider imposition of a moratorium on the issuance of all building permits and the acceptance and approval of all subdivision maps.

X

Mandatory

The Board of Supervisors shall impose a moratorium on all building permits and the acceptance and approval of subdivision maps within the jurisdiction of the affected district until adequate capacity is available.

3. Fire Protection Districts

I

No Action
Necessary

II

Mandatory

Annexation to (or contract with) a fire protection district shall be required before approval of tentative maps, tentative parcel maps, and special use permits.

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Performance
RatingAction
TypeAction
Description

III

Precautionary/
Advisory

The affected fire protection agency shall be requested to file a report with the Board of Supervisors detailing plans and schedules for all projects necessary to provide adequate fire protection to the area consistent with the appropriate fire protection standard (Urban, Estate or Rural).

IV

Mandatory

The Board of Supervisors shall consider a moratorium on the acceptance of all tentative maps, tentative parcel maps, and special use permits until such time as the facilities required to meet the appropriate fire protection standards are assured and the area has annexed to (or contracted with) the fire protection district.

APPENDIX IV. B.

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Capital Improvement Projects in the Unincorporated Area		1 of 3
<u>Purpose</u> To establish a policy to promote the development, provision and coordination of adequate public facilities and services in the unincorporated area consistent with the County Regional Growth Management Plan. <u>Background</u> The construction and provision of facilities and services in the unincorporated area is a shared responsibility of the County and numerous independent special districts. Traditionally, the County has been concerned with the impacts of major capital improvement projects within the unincorporated area. This concern has centered mainly on the fiscal, environmental and growth-inducing impacts of these projects. Because of the extended project development time for major facilities (from three to five years) it is becoming increasingly difficult to expand systems to meet the service demands of communities experiencing reasonable and orderly growth. In addition, because some services and facilities -- sewer service, structural fire protection, water supply and schools -- are provided by special districts there is often little the County can do to ensure that required projects are developed in a timely fashion. County government also lacks any direct control over annexations, reorganizations and facility improvements made by the numerous special districts in the unincorporated area. However, governmental structure changes are periodically reviewed and approved by the Local Agency Formation Commission and funding for most large facility improvements typically includes State and Federal grant monies which are subject to A-95 review by Comprehensive Planning Organization (CPO). A member(s) of the Board of Supervisors represents the County on the CPO and LAFCO Boards of Directors. From these positions the County can exercise some influence over the approval of LAFCO and A-95 proposals in the unincorporated area. Government Code Section 65401 requires the County to annually prepare a coordinated program of capital improvements proposed to be undertaken in the ensuing fiscal year by public agencies responsible for the provision of capital facilities within its jurisdiction. The Integrated Planning Office has developed a program for the implementation of the provisions of Section 65401, and is working with the affected special districts to resolve some of the ambiguities of the section. While 65401 does not require special districts to detail multi-year capital improvement programs, IPO is working to develop voluntary support of this concept. The timely development of capital improvement projects to relieve existing and projected deficiencies is essential to any growth management program in order to:		

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1. Avoid the economic and fiscal impacts of moratoria.
2. Ensure a stable and orderly growth rate within the Urban Development Areas -- thereby avoiding the adverse impacts of a "boom or bust" growth cycle.
3. Ensure the greatest possible attainment of the Goals and Objectives of the Regional Growth Management Program.
4. Facilitate compatible private development projects thereby reducing the avoidable impacts on the cost and availability of housing throughout the region.
5. Avoid undue development pressures in growth management categories which require fewer facilities or facilities at lower standards (i.e., Estate, Rural and Country Towns).

On July 26 and August 2, 1977, the Board of Supervisors approved the Goals and Objectives of the Regional Growth Management Program. The following approved goals and objectives indicate the County's concern that sufficient facility capacity be developed to accommodate the population goals within the unincorporated area and that the provision of these facilities and services be adequately coordinated:

Capital Facilities

1. Goal - Provision and Phasing of Facilities

Assure efficient, economical and timely provision of facilities and services* to accommodate anticipated development to 1995.

- Provide future urban development with facilities and services meeting the standards defined in the Growth Management Plan.
- Promote extension of facilities to areas contiguous to existing facilities and at a rate of expansion generally consistent with anticipated growth.
- Provide essential facilities and services necessary for the minimum functioning of communities concurrently with, or prior to, urban development.

* Facilities and services covered in the Growth Management Plan include water, sewers, schools, fire protection, police protection, flood control, roads, public transportation availability in urban areas, libraries and local parks.

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2. Goal - Coordination of Facilities Planning Programming and Implementation

- Coordinate the location and timing of public facility improvements with the programming of improvements by other jurisdictions and private parties to the degree that the facilities are interdependent or have direct impact on each other.
- Take all appropriate actions to assure that there is coordination in the expansion of major facilities by various serving agencies, consistent with the County General Plan and growth management goals and objectives.

Policy

To facilitate the orderly accommodation of approved population growth, it is the policy of the Board of Supervisors that:

1. The County of San Diego will actively support all capital improvement projects including those of special districts which are required to relieve existing and projected deficiencies resulting from the orderly development of unincorporated communities as prescribed in the Regional Growth Management Plan.
2. The County of San Diego will prioritize all Capital Improvement expenditures for which it has responsibility (in the Six-Year Capital Facilities Program) in a manner which will support the orderly development of the unincorporated communities and the priorities, strategies, goals and objectives of the Regional Growth Management Plan, and the proposed County Policy concerning "Expenditures Within Identified Target Areas".
3. The County of San Diego, through implementation of Government Code Section 65401, will include capital improvement projects of independent special districts in the Six-Year Capital Facilities Plan with comments as to project consistency with the Regional Growth Management Plan.
4. The County of San Deigo will actively oppose any capital improvement project or decision impacting service delivery in the unincorporated area found to be inconsistent with the Regional Growth Management Plan. Active opposition will include casting negative votes for grant applications (A-95 review process), annexation applications (LAFCO), and any and all available alternatives under the law.

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ROAD ADEQUACY POLICY		

Purpose

To establish a policy to ensure that peak hour roadway capacity for the County's Circulation Element is sufficient to accommodate the demands from the approval of discretionary permits.

Background

A major concern within the unincorporated communities centers on the adequacy of public facilities. The "Facilities Adequacy Policy" deals with the provision of sewerage, water supply, structural fire protection and educational facilities. Analysis of the County's Circulation Element, however, does not lend itself to the type of regulation contained in this policy. Some factors which make the analysis of roadway capacity and future traffic impacts unsuitable for inclusion in the Facilities Adequacy Policy are:

1. The impact of development upon the roadway system are not localized to the vicinity of the proposed project.
2. Precise traffic capacities for any defined level of service are difficult to determine due to the unique characteristics of each roadway section, the type of access and the level of intersection control.
3. Peak hour traffic volumes are somewhat self-adjusting; that is, when traffic approaches the "capacity" of major roadway elements commuters tend to seek alternative routes, where available, and/or readjust travel schedules to avoid peak traffic congestion.

While the analysis of traffic problems is difficult, the recognition of overloaded streets and highways is an essential consideration of land use planning. In order to ensure fulfillment of the County's land use responsibilities and to encourage consistency with the policy concerning "Expenditures With Identified Target Areas" the Department of Transportation will identify and report on all overloaded roadways and coordinate future road improvements in the County's Six Year Capital Facilities Program subject to the availability of funds.

Policy

It is the Policy of the Board of Supervisors that:

- A. The Department of Transportation will make a determination that sufficient capacity exists to accommodate the additional traffic generated by all proposed major subdivisions prior to their approval when any one of the following conditions exist between the proposed subdivision and the nearest freeway interchange in any direction from the subdivision:

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1. "D" level of service (as defined in the Highway Capacity Manual) is experienced at peak hour traffic volumes on County Circulation Element roadways or, 2. 1,200 vehicles per hour per lane at peak hour traffic volumes for roads with limited access, or 3. 900 vehicles per hour per lane at peak hour traffic volumes for roads without limited access.		
B. If the determination indicates that insufficient capacity exists to accommodate the demands of the proposed subdivision, the Environmental Impact Report for the proposed subdivision shall contain a statement from the Department of Transportation describing the extent and timing of the capital improvement projects necessary to eliminate the deficiency or arrangements and agreements with the developer(s) which will ensure elimination of the deficiency.		
C. Major subdivisions shall not be approved where insufficient capacity exists unless the capital improvement project (as indicated in B. above) is contained in the current Six Year Capital Facilities Program.		

APPENDIX IV. D.

WATER SUPPLY AND WASTEWATER ISSUES

There are three major issues pertaining to the availability of water supply and wastewater disposal:

1. Availability of grant monies for sewage treatment plant expansion.
2. The long term feasibility of wastewater reclamation projects.
3. Regional coordination of major water and wastewater projects with adopted land use and growth management plans.

Sewage Treatment Plant Expansion:

The availability of sewage treatment capacity represents a major constraint on short-term growth in the entire San Diego Region. In recent years, the number of communities with subdivision and building moratoria has steadily increased. While each moratorium is unique, there are several major issues which affect rescindment of existing moratoria and the possibility of additional moratoria based upon inadequate sewage capacity.

The primary issue impacting existing sewerage agencies is the Federal Water Pollution Control Act (Public Law 92-500). PL 92-500, enacted in 1972, requires that all municipal sewage treatment facilities be upgraded to provide secondary levels of treatment by 1 July 1977. Of the three major treatment facilities which provide sewage treatment for the unincorporated area none were able to comply with the July 1977 deadline. These major facilities, Encina Water Pollution Control Facility (WPCF), San Elijo WPCF

and the Metropolitan Sewerage System, currently provide primary treatment and discharge the treated effluent by means of deep-water ocean outfalls.

Both the County of San Diego and the City of San Diego are actively seeking exemption from the requirement for secondary treatment. In order to comply with the requirements of PL 92-500, both agencies are simultaneously developing projects to upgrade these major facilities to secondary levels of treatment. The case for a regional exemption to PL 92-500 is based upon the unique characteristics of San Diego's coastal waters. The primarily treated effluent is discharged to deep-water currents where it is quickly dispersed and oxidized. The coastal waters in the vicinity of the existing ocean outfalls have been monitored for years and no significant environmental degradation has been detected.

Another major reason for seeking an exemption to PL 92-500 involves cost. While the State and Federal Governments fund up to 87-1/2 percent of eligible projects costs, the remaining local share can have considerable fiscal impact upon the sewerage agencies resulting in higher user costs. In addition, the operation and maintenance of a secondary facility is considerable more costly than for a primary facility. A significant factor in the increased operational cost is the fact that a secondary treatment facility can require up to ten times the amount of energy to treat the same volume of sewage as a primary facility. Until the issue of exemption from the requirements of PL 92-500 is resolved the future costs of sewage treatment will be highly speculative.

Another issue impacting the sewerage agencies of the region is the availability of State and Federal grants for the expansion of facilities. The two County coastal facilities have had applications under review for several years. Approval of the applications have been delayed pending resolution of the air quality issue. Much of San Diego County has been declared a "critical air basin". This means that the Federal oxidant standard of eight (8) parts per hundred million is exceeded more than once a year. Until conflicts between the Environmental Protection Agency and the County's Regional Air Quality Strategy are resolved, it is unlikely that the area will receive any State or Federal funds for expansion of existing sewage treatment capacities. In the interim, however, the EPA has offered to approve grants for the upgrading of these facilities to secondary treatment under the condition that no increase in sewage flows (and, therefore, no new connections to sewage systems) be allowed for five years or until the conflicts in the Regional Air Quality Strategy are resolved. While this proposal would enable the facilities to comply with PL 92-500, it would not accommodate any significant growth in the near future.

Water Reclamation:

Due to the recent state-wide shortage, there is a general awareness that our water resources are finite. Several governmental agencies are currently investigating the long-term feasibility of reclamation in the San Diego region including the San Diego Regional Water Reclamation Agency (Santee Joint Powers Agency) and the Comprehensive Planning Organization for the "208" Areawide Water Quality Management Plan.

The feasibility of wastewater reclamation is primarily a function of two complex factors. First is the availability and cost of imported water. The amount of imported water available to the region is dependent upon the completion of the State Water Project. If this project is not fully realized reclamation could become a necessity in order to meet the projected future domestic, industrial and agricultural demands for water. Regardless of the ultimate amount of water made available to the region, the cost of imported water will increase substantially due to the increased cost of power to transport the water to Southern California.

The second major factor in determining the feasibility of reclamation is the cost, above and beyond the cost of sewage treatment. The determination of this cost must address:

1. Existing costs for treatment (this will vary significantly depending upon the existing level of treatment, i.e., primary or secondary).
2. The total cost of imported water to the region.
3. The availability and dependability of markets for reclaimed water; this includes agricultural, industrial and semi-public markets.
4. Participation in and contractual obligations to regional treatment facilities and associated "fixed" costs.
5. The degree of additional treatment required to affect reclamation: demineralization, if required, is substantially more costly than other forms of reclamation.

6. The costs, capital and operational, to transport reclaimed water to the secured markets.
7. The relative feasibility of localized ("satellite") reclamation facilities versus regional reclamation.
8. The availability of grant funds for reclamation facilities.

The County and City of San Diego are currently developing a plan of study and grant application for a San Diego Area-Wide Reclamation Study. The purpose of the study will be to identify the future market potential and the optimal size, location and feasibility reclamation facilities in the San Diego Region. The objective is to develop projects within the region that will result in significant reclamation of wastewater (20 - 40 million gallons per day). The study is to be based upon existing reclamation plans: "208" Reclamation and Reuse, Comprehensive Planning Organization; City of San Diego "201" Plan, City of San Diego; and Water Reclamation Study - western Carlsbad and San Dieguito Areas, County of San Diego.

Regional Coordination:

A major goal of the growth management program concerns the coordination of facilities planning programming and implementation. A related objective indicates the County should "take all appropriate actions to assure that there is coordination in the expansion of major facilities by various serving agencies, consistent with the County's General Plan and growth management goals and objectives". Perhaps the most effective means of attaining these goals and objectives is by ensuring a significant role for the County in the management of the "208" Area-Wide Water Quality Management Plan.

The Comprehensive Planning Organization (CPO) is currently preparing the Area-Wide Water Quality Management Plan as required under Section 208 of the Federal Water Pollution Control Act (Public Law 92-500). This same section provides the Governor of California must designate an agency to manage the plan. The management agency has two important functions. First, it is responsible for plan implementation; and second, its existence is a condition of grant eligibility for all wastewater and water reclamation projects.

At present, CPO's consultant, J. B. Gilbert and Associates, is preparing that portion of the 208 Management Plan known as "Institutional Arrangements". The consultant has submitted four alternative forms for the management agency, two of which he believes can be readily implemented at this time.

One of the two realistic alternatives is "existing institutions". It assigns plan implementation responsibilities to the existing cities and districts. The other alternative is titled "County Government". The "County Government" alternative represents, by far, the greater potential for implementation of the Regional Growth Management Plan.

The "County Government" management alternative proposed the creation of a Water Use Coordinating Agency (WUCA) that will provide for the integration of water management with that of land use specifically, but also with other local and regional concerns such as growth management, solid waste, air quality transportation and a variety of social, health care and economic plans. The proposed WUCA will:

- retain the primary role of operating agencies to generate proposals and implement these proposals.
- vest both the planning and implementation decision-making process at those levels nearest to all of the people affected by these decisions.
- provide that this process takes place within a broad jurisdictional area where relative priorities of the various community needs are considered.
- provide a forum that includes representation from all major special and multipurpose governments within the sub-regional boundary.
- take into account in the decision-making process not only the interests of people within the jurisdiction of the initiating agency, but also the effects of the proposal upon those residing outside that jurisdiction.
- recognize that elected officials of multi-purpose units of government must have major voice in the decisions on water-use in the drainage basins.

Current legislation provides for San Diego County Flood Control District, which encompasses a substantial portion of the County, divided into five zones. Legislation will be required to establish the WUCA, displacing the existing San Diego Flood Control District and assuming all of the duties and powers now residing within the Flood Control District.

Each zone will have a Zone Commission consisting of the representative from the cities, special districts and the conservation district within the respective zones. In addition, each Zone Commission would

employ a zone manager who serves at the pleasure of the commissioners.

Each WUCA Zone would assume the taxing authority of the existing Flood Control District Zone with its annual Budget subject to approval by the WUCA Board of Directors. There are provisions which allow for a weighted vote which recognizes the major responsibilities of multipurpose governments in implementing the "208" plan.

Decisions regarding major projects made within each of the six zones will be reviewed by the Board of Supervisors, acting as the WUCA Board of Directors. If it is determined that a decision made within an individual zone is clearly not consistent with regional needs, then the Board of Directors may override that decision by a 4/5ths vote, provided that the Director of the WUCA, whose supervisorial district overlies a major population of the zone, votes to override.

The WUCA Board of Directors, when requested to do so by no less than four Zone Commissions, may levy a tax not to exceed 2¢ per \$100 of assessed valuation in order to finance those activities which are beneficial to the total County area, (such as when water reclamation in the southern part of the County area must be subsidized, thereby releasing water for use in the northern part.)

The "County Government" alternative also outlines the proposed process for implementing the "208" plan. The proposed process provides for:

1. maintaining the responsibilities of water supply and sewer-
ing agencies including the timely development of capital
improvement projects

2. review of agency capital improvement proposals by the WUCA Zone Commission with respect to adopted land use, and regional priorities
3. staff assistance in project development and in obtaining necessary permits and approvals at the discretion of the Zone Commissioners
4. final review and approval of projects by the WUCA Board of Directors
5. transmittal of completed grant application to the appropriate State and Federal agencies and CPO (for A-95 review)

In summary the "County Government" alternative for "208" Area-Wide Water Management represents a major means of attaining the approved goals and objectives of the Growth Management Plan, and implementing its locational and phasing strategies while maintaining and reinforcing the responsibilities of existing water use agencies to do the job for which they were formed.

APPENDIX IV. E.

CAPACITY ALLOCATION MATRIX

The Board of Supervisors directed staff to evaluate the efficacy of a capacity allocation matrix as a growth management technique. An analysis follows.

Due to the unavailability of state and federal grants and the extended periods required for project development many sewerage agencies in the unincorporated area are currently operating at, or near, their permitted or contractual capacity. The County is currently considering the implementation of a Sewer Allocation Matrix (SAM) in the Alpine and Lakeside County Sanitation Districts because of the limited reserve capacity available. This allocation matrix attempts to allocate the remaining capacity to those uses which are in the best interests of the Community.

Besides utilizing the amount of remaining capacity as a criterion for allocation, the matrix also considers:

1. the employment opportunities created by a development proposal
2. the inclusion of government subsidized low and moderate income housing
3. environmental impacts of the proposal
4. impacts on other facilities and services.

Originally the County tried to develop a single allocation matrix for all dependent County Sanitation Districts in order to maximize the utilization of each district's reserve capacity. However, to be most effective and to precisely reflect the values of the various

communities a separate allocation matrix would have to be developed for each affected community. Therefore, a standard capacity allocation matrix has not been developed as part of the Regional Growth Management Plan.

In general, there are two methods to implement a capacity allocation matrix. The most obvious method is to use the matrix as a land use planning tool and apply it to the acceptance or approval discretionary permits, such as subdivision maps and special use permits. When applied in this manner there appears to be no legal difficulties.

The second method involves allocating the remaining reserve capacity among building sites which have already been created: this is the method of implementation proposed for Lakeside and Alpine Sanitation Districts. When used to allocate capacity among legal building sites, however, the legality of such action is uncertain. A recent County Counsel opinion indicates.. "There is no statutory or case-law authority in California either for or against the proposition that a utility-providing district has the authority to withhold service based upon factors such as those contained in the proposed matrix.The County Counsel does not recommend against the establishment of demonstration project to test the matrix if the legal uncertainty is an acceptable risk".

Although there appears to be some uncertainty associated with the implementation of allocation matrices, the basic concept appears to be of significant value to communities. In light of the limited reserve capacities of sewerage agencies county-wide, additional development and refinement of the SAM could be a very important strat-

egy in the accommodation of short-term growth. Depending upon the results of the demonstration project in Lakeside and Alpine, the Board of Supervisors could consider the development and implementation of capacity allocation matrices in lieu of the inevitably more restrictive future legislative alternatives.

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BOARD OF SUPERVISORS POLICY

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Groundwater Policy		1 of 6

Purpose

To establish a policy to insure that new development in areas not served by imported water will not exceed the long-term availability of local groundwater resources and to consolidate and give direction to the County's groundwater activities. It is the intent of this policy to: (1) establish interim density controls; (2) provide for uniform criteria for well testing and groundwater resource analysis; (3) develop a program of geotechnical studies to determine the long-term holding capacity of rural areas based on groundwater resources; (4) formulate permanent land use policies based on the holding capacity analysis of geotechnical studies; and (5) consolidate the County's groundwater activities under the direction of the County Hydrogeologist.

Background

The eastern two-thirds of San Diego County are totally dependent on groundwater resources; surface run-off is meager and too variable to be used as a water supply for the rural area and importation of water is not a viable option for the foreseeable future. Prior to the early 1960's limited land development had minor impacts on groundwater supplies; however, the recent proliferation of land development projects threaten to bring about a serious overdraft of groundwater resources. The total extent of groundwater resources is unknown, but recent studies indicate that groundwater reserves and annual replenishment are significantly less than previously considered. The Board of Supervisors recognizes the need to formulate land use policies based on long-term groundwater availability. However, no comprehensive studies of groundwater conditions which could serve as the guide for establishing maximum densities of the rural foothills, mountains, and desert regions of San Diego County presently exist. Recent localized studies are of sufficient technical detail to permit the development of interim controls.

Policy

It is the policy of the Board of Supervisors that applicable portions of the Groundwater Policy will be used by all County regulatory and land use planning agencies. This policy shall be uniformly applied to General Plan Amendments, Rezones, Divisions of Land, and Special Use Permits involving divisions of land and the County will not approve applications for such discretionary actions unless the application conforms with the provisions of this policy. This policy does not apply to building permit applications.

A. Interim Lot Size Control

On an interim basis this section establishes the minimum lot sizes for General Plan Amendments, Rezones, Divisions of Land, and Special Use Permits involving divisions of land for areas outside the

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Boundaries of the County Water Authority and areas inside the boundaries of the Water Authority which cannot provide documentation from the appropriate water serving agency of intent to connect. Interim minimum lot sizes are based on the relationship of holding capacity as determined by phenomenon of groundwater recharge, storage and discharge and to the empirical relationships between these factors and precipitation and slope. Unless otherwise specified in the Groundwater Policy, the minimum lot sizes shall be:

Minimum Lot Sizes (In Acres)

<u>Mean Annual Precipitation</u>	<u>Less than 15% Slope</u>	<u>Greater Than 15% Slope</u>
10 Inches or Less	20	40
10 to 22 Inches	8	20
Over 22 Inches	4	8

While the provisions of this section are in effect, no County agency may require an applicant, whose proposed lot(s) comply with the minimums established by this section, to provide geotechnical information related to the sufficiency of groundwater supplies. This exemption does not apply to statutory requirements of the California Environmental Quality Act or the Department of Public Health; or Environmental Review Board however, the Board of Supervisors encourages the (ERB) to not normally require groundwater supply information from an applicant which conforms with the minimum lot size criteria. County agencies may require groundwater quality information when appropriate.

The provisions of this section do not apply to Borrego Springs (See Section D).

B. Provision for More Intense Uses

Part 1.

Rezoning, Divisions of Land and Special Use Permits associated with Divisions of Land may be permitted to densities greater than those in Section "A" provided that such discretionary actions are consistent with the land use densities of the General Plan and the applicant can demonstrate that the proposed project meets the management objectives of Policy 6 (x-15) of the Conservation Element - namely:

1. Groundwater extraction for the project will not exceed the short or long-term groundwater resources of the area;

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2. Groundwater resources (aquifer) underlying the project site will be capable of supplying the water required;
3. Cumulative groundwater extraction will not significantly adversely affect flora, fauna, springs, streams, or water rights of other property owners; and
4. Groundwater quality will not be significantly degraded by surface or subsurface discharge of wastewater.

Part 2.

General Plan Amendments may be permitted to densities greater than those in Section "A" provided the application is for land uses and densities which are consistent with (1) similar land uses in the area; (2) the applicable rural or estate category of the adopted Growth Management Plan; and (3) the applicant can demonstrate that: The proposed General Plan Amendment meets the management objectives of Policy 6(x-15) of the Conservation Element - namely:

1. Groundwater extraction for uses permissible in the requested General Plan Category will not exceed the short or long-term groundwater resources of the area;
2. Groundwater resources (aquifer) underlying the project site will be capable of supplying the water required for uses permitted in the General Plan Category;
3. Cumulative groundwater extraction will not significantly adversely affect flora, fauna, springs, streams, or water rights of other property owners; and
4. Groundwater quality will not be significantly degraded by surface or subsurface discharge of wastewater.

Demonstration of the management objectives in this section must be done in compliance with the provisions of Section "C" of this policy.

The provisions of this section do not apply to Borrego Springs.
(See Section D)

C. Guidelines for Groundwater Studies

When a regulatory or planning agency such as the Integrated Planning Office (IPO), the Department of Land Use and Environmental Regulation (LUR), or the Environmental Analysis Division (EAD) determines that a proposed project is subject to the provisions of Section "B" or "D" of this policy, that groundwater quality or quantity infor-

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mation is necessary for staff recommendations, or that groundwater information is needed pursuant to the requirements of the California Environmental Quality Act, the project staff of that agency will refer the applicant to the County Hydrogeologist. The County Hydrogeologist, working with the applicant and project staff, will: (1) oversee the preparation of the groundwater study; (2) ensure that the groundwater study is prepared in accordance with the provisions of the "County Guidelines for Groundwater Studies", and when appropriate the informational requirements of CEQA; and (3) certify to the initiating agency as to the completeness and accuracy of the study results for determining compliance with the Groundwater Policy and for making recommendations on the proposed project.

The initial "County Guidelines for Groundwater Studies" have been prepared by the Regional Growth Management Task Force and will go into affect immediately. The County Hydrogeologist may periodically update the guidelines. The County Guidelines must specify:

- Who may perform groundwater studies
- Regional and site specific requirements for determining groundwater availability
- Test well requirements
- Questions the hydrogeologic study must answer
- Procedures for determining mean annual precipitation (For Section "A")

D. Borrego Springs

For the purposes of this section Borrego Springs is considered to be the contiguous private holdings, consisting of approximately 60,000 acres, which lie in the area known as Borrego Valley. Borrego Valley is surrounded by the Anza Borrego Desert State Park.

It is the intent of the County to not approve applications for changes in the General Plan; or rezones which would result in an overall increase in the potential number of dwelling units in the Borrego Springs area until the County completes a cumulative environmental analysis. This analysis must, at a minimum, provide sufficient air quality and groundwater data to allow determination of the holding capacity of the region. This analysis must be completed prior to undertaking a regional planning effort: the most limiting constraint(s) identified in the environmental analysis will determine the maximum holding capacity the new plan can accommodate.

Applications for divisions of land and special use permits associated with divisions of land may be approved by the County provided

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they are consistent with the General Plan and zoning, and they satisfy other regulatory requirements of the County.

The provisions of Sections "A and B" will not apply to Borrego Springs; however, if a county department determines that groundwater information is necessary for a discretionary action the provisions of Section "C" shall apply.

E. Removal of the Interim Lot Size Controls

The County Hydrogeologist will undertake an appropriate geotechnical study to determine the long-term availability of groundwater resources in those areas not served by imported water. The study will investigate groundwater recharge, circulation, storage, discharge, use and quality. State and Federal monies will be sought to help finance this project. Participation by State and Federal Agencies will also be encouraged. Once the groundwater study is complete, the County Hydrogeologist will recommend to IPO land use policies. IPO will, in an accelerated manner, use these recommendations as the foundation for the formulation of new rural land use policies and designations. The Interim Lot Size Controls will be removed when these new policies are adopted by the Board of Supervisors.

If the County Hydrogeologist is unable to undertake a County-wide groundwater study because of the unavailability of General Fund and grant monies, IPO will propose, as part of its annual operating budget, sufficient funding to support regional studies. The boundaries of the regional studies should be drawn on hydrogeologic factors. Land use policies based on the regional studies will, when adopted by the Board of Supervisors, replace the interim controls on a regional basis.

F. Functions of the County Hydrogeologist

The County Hydrogeologist will have overall responsibility for coordinating groundwater activities within the County structure. Specific duties of the County Hydrogeologist will include:

- Overseeing the preparation, and the review and certification of groundwater studies for privately initiated projects.
- Preparing recommendations to County agencies (IPO, LUER, EAD, etc.) on the groundwater aspects of proposed development projects and General Plan Amendments.
- Revising the "County Guidelines for Groundwater Studies".
- Undertaking geotechnical studies to determine the long-term holding capacity of rural areas based on groundwater resources.

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- Preparing recommendations for land use policies based on groundwater studies. - Coordinating with appropriate County, local, State and Federal agencies. - Developing and maintaining a file of well and well log information, geological studies, and groundwater studies. - Preparing and executing groundwater grant proposals. - Assisting local mutual water companies and organized community groups (when groundwater is involved) prepare consultant contracts, well field management programs, basin studies, pump tests, and other geotechnical information. Assistance will be limited to that of advisory status. - Implementation of Action Programs 6.1 - 6.4 (X-15) of the Conservation Element.		

COUNTY GUIDELINES FOR GROUNDWATER STUDIESPurpose

The "County Guidelines for Groundwater Studies" are designed to provide uniform criteria for evaluating the adequacy of groundwater resources for private development projects. The guidelines are provided as a guide for groundwater studies; the County Hydrogeologist with concurrence from the applicant may in writing modify the guidelines to meet the site specific conditions.

A. Prodecures for Determining Mean Annual Precipitation

(TO BE DETERMINED)

B. Demonstration of Availability of Groundwater Resources

Demonstration of groundwater availability must be done by a Registered Geologist in accordance with the following criteria:

1. Site specific hydrologic investgation to determine long-term groundwater availability.
 - a. A geologic analysis of the watershed to identify and evaluate any boundary conditions (i.e., faults, lithologic contacts) that may adversely affect groundwater availability.
 - b. Evaluation of runoff and infiltration potential of the soils.

- c. Evaluation of groundwater occurrence, depth, movement, recharge, discharge, storage capacity, and chemical characteristics. This examination should include:
- the amount of groundwater available for the project during the most adverse series of dry years.
 - The expected availability of water under maximum possible development of the project in future increments of time.
 - The anticipated depths and yields of recommended wells.
 - The feasibility of obtaining water by individual wells as compared to community well systems.
 - Detailed descriptions of all methodology used in the analysis, with an evaluation of the adequacy/accuracy of the methodology and data.
- d. The hydrogeological investigation should include the cumulative effects full development of the proposed project would have on existing water uses on other property in the watershed. The investigation should address the predicted regional effects on groundwater availability with time due to withdrawal requirements for the maximum possible development of the project.
- e. The production characteristics of wells on adjacent property, including all dry or poor producing wells, should be discussed.

- f. Test wells should be constructed, with observation wells, to evaluate aquifer performance including transmissivity, storage coefficient, and specific yield; to evaluate groundwater in storage; and to evaluate potential interference effects. The number of wells will depend upon the hydrologic regimes present on the property and the size of the project (see Section 2 for test well requirements).
- g. The conclusion of the hydrologic investigation must answer the following questions:
 - (1) The amount of groundwater available for the entire development during the most adverse series of dry years;
 - (2) The expected availability of water under full development at future increments of time;
 - (3) The predicted regional groundwater decline with time due to pumping for the development;
 - (4) Whether the proposed method of obtaining the water (e.g., the individual wells or community water supply) is feasible;
 - (5) The anticipated depths and yields of recommended wells;
 - (6) The chemical and bacteriological quality of the water;
 - (7) Type of wells to be used; and
 - (8) The adequacy of source data.

2. Test Wells

An aquifer test and long-term yield evaluation shall be part of the Water Supply evaluation. The time of year for testing shall be determined by the person responsible for the water supply evaluation.

The test shall have two objectives: (1) to provide information from which aquifer parameters, such as transmissivity can be calculated, and (2) determine the long-term yield of the well. The first objective shall generally be accomplished during the first 24 hours of test pumping. The second objective shall be accomplished as a result of the remainder of the testing period in combination with previous experience gained in the specific area.

a. Requirements for Test

- (1) The water level in the well should be observed for 24 hours prior to the test to determine the initial groundwater table. If the groundwater prior to the test is not stable, observations should be used to adjust the actual test draw-down data for analysis. Pumping of any wells in the vicinity of the test well, which may influence the test results, should be regulated to discharge at a constant, uninterrupted rate prior to and during the complete test or until pump shutoff.
- (2) Any test wells drilled during the exploration of the site shall, at the discretion of the

County Hydrogeologist be preserved in such a manner that they may be used for observation wells to supplement the well testing procedures.

- (3) The measurements to be made for either of the objectives include the static water levels before pumping is started, the pumping rate or rate of discharge from the pumped well, pumping levels or dynamic water levels at suggested intervals during the pumping period, time of starting the pump, time of change in discharge rate and time of stopping the pump (suggested forms included).
- (4) The duration of the test shall be determined by person responsible for water supply evaluation in consultation with the County Hydrogeologist. Decisions about test duration shall be made on the basis of well performance. In any case, a test beyond ten days shall not be conducted without the approval of the County Hydrogeologist and the Subdivider.
- (5) The test pump should be a centrifugal, or more preferably, a turbine or submersible pump. It should be capable of lowering the water level to near bottom of the well being tested for the duration of the test. The pump should preferably be powered with an electric motor, or with an engine capable of operating continuously for the duration of the test. The pump discharge line should be equipped with a valve so that the rate

of discharge can be accurately controlled.

- (6) During the aquifer parameter test portion of pumping, it is imperative that the water rate (Q) be constant. During the remainder of the test the flow rate shall be adjusted such that water level in the well simulate actual long-term drawdown; i.e., water level near bottom of well.
- (7) Lowering of the water level in the well will usually cause the pumping rate to decrease unless the valve in the discharge line is opened to compensate for the additional head or lift created on the pump. If the pump is powered with a gas or diesel engine, changes in temperature and humidity of the air may affect appreciably the operation of the engine and thus cause variations in the pumping rate. Variations in line voltage may similarly affect the speed of electric motors and thus the pumping rate. Any appreciable variation in pumping rate should be recorded and the cause of the variation noted.
- (8) The flow from the test well must be conveyed from the test site so that recharge of the aquifer from water being pumped does not occur within the zone of influence of the test well.
- (9) Water levels in pumped well shall be measured with electric sounder. Water levels in observation

wells may be measured with either electric sounder or chalk tape. It is recommended that a recording flow meter be installed in the discharge line, such that total volumes can be measured.

- (10) Pumped well shall be equipped with access tube extending to near depth of pump intake to allow access for electric sounder.

b. Time Interval Recommendations

- (1) Recommended time intervals for measurements in the pumped well

<u>Time Since Pumping Started</u>	<u>Time Intervals</u>
0 - 5 Minutes	30 Seconds
5 - 60 Minutes	5 Minutes
60 - 100 Minutes	20 Minutes
100 Minutes - 5 Hours	30 Minutes
5 Hours - 48 Hours	60 Minutes
48 Hours - 6 Days	3 Times Per Day
6 Days - Shutdown of Pump	1 Time Per Day*

*Several additional measurements should be made during the day prior to shutdown of pump.

d. The records required for analysis and the tolerance in measurement generally considered acceptable are as follows:

- (1) Control-well discharge (± 10 percent).
- (2) Depth to water in wells below measuring point (± 0.1 feet).
- (3) Distance from control well to each observation well (± 0.5 percent).
- (4) Synchronous time (± 1 percent of time since control effected).
- (5) Description of measuring points.
- (6) Elevations of measuring points (± 0.1 feet).
- (7) Vertical distance between measuring point and land surface (± 0.1 feet).
- (8) Total depths of all wells (± 1 percent).
- (9) Depth and length of screened intervals of all wells (± 1 percent).
- (10) Diameter, casing type, screen type, and method of construction of all wells (nominal).
- (11) Location of all wells in plan, relative to land-survey net or by latitude and longitude (accuracy dependent on individual need).

e. Copies of test results, (actual measurements made) shall be filed with the County Hydrogeologist.

(2) Recommended time intervals for measurements of water level in observation wells

<u>Time Since Pumping Started</u>	<u>Time Intervals</u>
0 - 5 Minutes	30 Seconds
5 - 15 Minutes	1 Minute
50 - 100 Minutes	10 Minutes
100 Minutes - 5 Hours	30 Minutes
5 Hours - 48 Hours	60 Minutes
48 Hours - 6 Days	3 Times Per Day
6 Days - Shutdown of the Pump	1 Time Per Day*

Recommendations are given only to emphasize the detail required for test purposes. It is recognized that final format for time intervals shall be a function of the well performance.

c. Recovery Test

A recovery test shall be made at the conclusion of the pumping test to provide a check of the pumping test results and to verify recharge and aquifer boundary conditions assumed in analysis of the pumping test. When the pump is turned off, the recovery of the groundwater levels should be observed in the same manner as when the pump was turned on, except that the County Hydrogeologist shall determine end point of recovery test.

*Several additional measurements should be made during the day prior to shutdown of pump.

APPENDIX V. C.

EXECUTIVE SUMMARY OF PROPOSED HYDROGEOLOGIC STUDY
OF RURAL SAN DIEGO COUNTY

The rural portions of eastern San Diego County receive approximately thirty inches of rainfall annually. Surface run-off is meager and too variable to be used as a water supply for the area; and importation of water is not a viable option for the foreseeable future. Limited development prior to the early sixties resulted in insignificant impacts on groundwater supplies; however, the recent proliferation of land development projects and proposals threaten to bring about a serious overdraft of groundwater resources. The total extent of groundwater resources is unknown, but recent studies indicate reserves are significantly less than previously considered. The San Diego County Board of Supervisors have recognized the need to formulate land use policies based on long-term groundwater availability. However, no comprehensive studies of groundwater in rural San Diego County are available which could serve as a guide.

Objectives

The overall objective of the proposed project is the proper management of groundwater resources so that optimal land use can be achieved. Realization of this objective will require basic research on groundwater in crystalline rocks. Specific objectives of the project are:

1. Development of a comprehensive model of groundwater circulation and storage in San Diego's rural areas. Model will have application in other areas with similar geology, physiography and climate.

2. Development of a regional groundwater budget for the study area.
3. Formulation of County policies for land use, based on groundwater availability.

Approach

In the investigation of the physical system, the approach to be taken is that the components of the groundwater network -- recharge, circulation, storage and discharge -- are largely manifested in the surficial features which can be readily measured and mapped. Such features include lithologic types, structural fabric, degree of weathering, soil development, vegetation type and density, rainfall, spring discharge, surface flow and geomorphology. Geochemical analysis, inexpensive geophysical surveys, and limited well drilling and testing will also be performed.

Formulation of County policy will take the approach that long-term groundwater availability is a limiting factor on the density of water-using developments in the mountains. The initial step will be the formulation of policies requiring submittal of standardized information on groundwater availability for proposed land development projects. The second step will be the amendment of the land use element based on the groundwater budget developed from the investigation of the physical system.

Scope

The two to three year project will study approximately the eastern fifty percent of the County and will cost \$300,000 to \$500,000.

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Purpose

To establish a policy for encouraging the transition of urbanizing but unincorporated areas of the County to municipal status through annexation or incorporation, or other appropriate alternative local government structures.

Background

Various unincorporated areas of the County are rapidly urbanizing into city-like communities. Historically, the County has not taken an active role in encouraging annexations to cities or incorporations. However, there is a growing need to assist the citizens of these new urban areas in achieving municipal status. As communities urbanize there is inevitably a desire for land use control and decision making at the community level. Additionally, there is a need and demand for extended levels of municipal-type public services, such as police and fire protection, local parks and recreation programs, improved roads, drainage and trash collection and direct citizen access to local government services such as the community planning process.

Extended service levels vary with the age and composition of communities in the unincorporated areas and do not correspond to the provision of any common set of services. These extended service levels should be paid for by people who receive the benefit of the service. Individual analysis in reorganization studies must be made area by area, and service by service, so that a fair payment structure can be devised. This payment structure may consist of County Service Areas, various types of special districts or arrangements developed with adjacent municipalities.

Local government service delivery requires cooperation between cities and the County and independent special districts. Certain services -- such as courts, health care, welfare, probation and elections -- are provided by the County to all County residents (in both incorporated and unincorporated areas). These services are not substantially affected by annexation or incorporation decisions. Other services -- such as land use planning, parks and recreation, libraries, streets, sewers, police and structural fire protection -- are usually provided by cities. In unincorporated areas, those urban services are commonly financed through special taxing districts or the County General Fund. As unincorporated areas urbanize, the proliferation of these separate service delivery systems makes coordination increasingly difficult as service levels increase. In some cases consolidation of service delivery systems into a single municipal system can reduce costs or increase efficiency of service delivery.

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The Regional Growth Management Plan designates Urban Development Areas. These provide the basic framework for the application of policies and controls on land use, service provision, fiscal analysis, social programs, environmental management, and governmental structure policies. The overall objectives of the Regional Growth Management Plan are to influence the County's population growth and distribution so as to protect and wisely use scarce resources; and provide more efficient and cost effective delivery of services. The local government structure policy plays a central role in the strategy to direct growth into governmental units best suited to provide the appropriate levels of service.

Specific conditions determine the feasibility and timing of annexation or incorporation. Therefore, six categories of circumstances have been identified so that County policies may be targeted and prioritized for specific areas.

The six categories of relative potential to annex or incorporate, in order of priority for County effort, are as follows:

1. County Islands.
2. Urban Development Areas with potential to annex.
3. Urban Development Areas with potential to incorporate by 1985.
4. Urban Development Areas with potential to incorporate beyond 1985.
5. Non-Urban Development Areas with potential to incorporate.
6. Non-Urban Development Areas without potential to incorporate.

The attached map titled Local Government Structure Policy Areas generally corresponds to the location of Urban Development Areas or Country Towns in each of the six categories.

The following guidelines are a component of the County's Regional Growth Management Plan. They represent a comprehensive strategy for encouraging the formation of appropriate local government structures for each of a variety of circumstances. Together they establish mechanisms for encouraging an orderly transition of selected Urban Development Areas to appropriate municipal status. This strategy implements the following goal, which was adopted by the Board of Supervisors for the Regional Growth Management Program:

Assure that the appropriate governmental structure is established for existing and developing unincorporated communities so as to provide for community self government and efficient and equitable provision of public services.

This policy applies incentive and disincentive policy actions which will encourage cities to annex adjacent areas and make incorporation a

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more attractive option in unincorporated urbanizing areas with a separate community identify and sufficient tax base.

Definitions

For the purposes of this policy the following definitions will apply:

1. "Area Planning Commission" (APC) is a body which could be established by the Board of Supervisors under the provisions of Government Code Section 31000.1 et seq. An APC would have jurisdiction to supplant the County Planning Commission and the Zoning Administration entity with respect to most adjudicatory matters including those under the California Subdivision Map Act for a specific sub-area of the unincorporated territory in the County.
2. "Community Identity", one of numerous incorporation criteria, is defined by such physical characteristics as existence of a community center or separate town center; and/or such social indicators as survey results, use of community name, and participation in levels of community activities (e.g., chamber of commerce, leagues).
3. "County Service Area" (CSA) is a special district established under the provisions of Government Code Section 25210.1 et seq. A CSA is governed by the Board of Supervisors and may be established to provide any one or more of the extended services or miscellaneous extended services specified in Government Code Section 25210.4 through 25210.4c as authorized by LAFCo within an unincorporated area.
4. "Community Services District" (CSD) is a special district as defined by Government Code Section 61000 et seq, which can provide a full range of urban services and is governed by its own independent governing board consisting of either a three or five member board of directors who are registered voters residing within the proposed district. The district may provide any one or more of the services specified in Government Code Section 61600 as authorized by LAFCo.
5. "Economic Analysis" in the context of an Incorporation Study is a comparison between the costs of providing services and the revenues available to pay for those services in the form of an estimated annual city budget. Costs are estimated based on the proposed level of each type of service to be provided by the city. Revenues are available from property tax and non-property tax sources. Non-property tax revenues are estimated based on various distribution formulas for items such as state subventions, sales and use taxes, motor vehicle in-lieu taxes, etc., and estimates of other revenues such as grants, fees and licenses. If non-property tax revenues are not sufficient to cover all costs in the city budget, property tax revenue is used to fund the balance of city costs.

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The estimate of property tax revenue required to balance the city budget is simply the difference between total estimated costs and estimated non-property tax revenues. The property tax rate necessary to balance the budget of the city is then estimated by dividing the required property tax revenue by the total assessed valuation of the city. The property tax rate necessary to balance the budget of the city may be used as a rough measure of the fiscal feasibility of incorporation. The estimated property tax rate can be easily compared to the tax rates of existing cities.		
If it is not feasible to estimate the annual city budget, per capita or per household assessed valuation may be used as very crude proxies for the estimated property tax rate. Assessed valuation per capita or assessed valuation per household for the proposed city can be compared to the County-wide median. Areas well below the County-wide median would be less likely to show incorporation feasibility while areas significantly above the County-wide median would be suitable for a more detailed analysis.		
6. "Expression of Community Interest", part of the government reorganization process, is measured by special petition to the Board of Supervisors requesting a study of incorporation, annexation or governmental reorganization containing signatures of five percent of the registered voters residing in the affected area.		
7. "Extended Levels of Urban Services" is defined as a higher level of services than is normally provided to the unincorporated portions of the County as determined by the Board of Supervisors. It may include such services as structural fire protection, local park facilities and programs, extended police protection, street lighting, trash collection, paramedic and other miscellaneous urban services. For the purposes of this policy, the concept of identifying an extended level of urban service which should be paid for directly by those residents receiving the service through the creation of a special taxing entity may be viable for some aspects of these services.		
8. "Fundamental Facilities" are the basic facilities which are required prior to or concurrently with development; they are as follows: sewer service, water supply, structural fire protection, educational facilities and access. Police protection is not included within the definition of fundamental facilities as it is provided by the Sheriff throughout the unincorporated area.		
9. "Municipal Organization Act of 1977" (MORGA), as provided under Government Code Section 35000 et seq, is an effective management tool to encourage the timely formation of new cities and annexations to existing cities, and has been enacted into law effective January 1, 1978. This law contains the most comprehensive reform		

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of California's local government boundary laws since the District Reorganization Act of 1965. MORGA includes a statement of policy and legislative intent that links the need for orderly growth to the logical expansion of cities. It recognizes that a single governmental agency is preferable to "several limited purpose agencies" for prioritizing community service delivery. The law simplifies the procedures for certain categories of annexations and permits the County to initiate annexation proceedings. This Board policy establishes the County's intent to fully utilize these provisions of MORGA which will lead to accomplishment of the goals and objectives contained in this policy.

10. "Municipal Advisory Council" (MAC) as defined by Government Code Section 31000.1 et seq, is an advisory body which may be established for an unincorporated area in the County. The purpose of a MAC is to advise the Board on matters which relate to that area as may be designated by the Board. Matters that a MAC may advise the Board on may include services which are or may be provided to the area by the County, including but not limited to advise on matters of public health, safety, welfare, public works and planning.

Policy

To achieve the objective of fiscal efficiency and sensitivity to local conditions, it is the policy of the Board of Supervisors that:

The following distinct and separate local government implementing strategies be pursued for each of the following six categories of unincorporated territory:

1. County Islands

Purpose:

In order to preclude conflicts in the provision of local government services the County shall assist in the expeditious annexation of unincorporated islands and work with the Local Agency Formation Commission to discourage the creation of additional County Islands.

Characteristics:

These are unincorporated areas which are surrounded or substantially surrounded by the territory of one or more cities (areas will be specifically designated).

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Policy Actions:

- Identify the appropriate city or cities to which the island should be annexed through consultation with LAFCo staff and affected cities.
- For those islands which fit the criteria specified in the Municipal Organization Act of 1977, assist the appropriate city in initiating proceedings to annex those island areas.
- Targeting of required improvements for those islands for which improvements are necessary in order to appropriate city to annex and where annexation can be accomplished, i.e., fit definition of MORGA or residents are interested in annexation. If annexation is not feasible, withhold improvements except those necessary for public health and safety.
- Within islands that do not fit the Municipal Organization Act of 1977 definition, place T-8 zone overlay on agricultural or underdeveloped land until area is annexed.
- Board support LAFCo in stringently enforcing the Government Code provisions prohibiting annexations which would create County Islands.

2. Urban Development Areas with Potential to Annex

Purpose:

To provide a range of incentives and disincentives which will result in timely annexation of appropriate areas to adjacent cities.

Characteristics:

- The area is adjacent to a city or cities.
- A sense of community identity exists among the unincorporated area residents with the adjacent city in terms of where the residents ship, facilities they use or postal designation.
- There may exist a developing commercial base which appropriately relates to the adjacent city's commercial activity.
- The area has all or most fundamental facilities and services and there is an identified need for expanded level of urban services that would be most effectively provided by the adjacent city rather than by the County.

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- The adjacent city has expressed interest by identifying the area on their general plan as a potential annexation area.

Policy Actions:

- The formation or expansion of County Service Areas will be discouraged in urban development areas where they would delay or preclude annexation of the area.
- In areas not preplanned by the adjacent city, place them within an overlay zoning classification which will establish an annexation reserve or a pre-zoned category to insure that the area will conform to the adjacent city's general plan and to insure that there will be no zoning inconsistencies.
- In areas that have been preplanned by the adjacent city, amend the general plan and zoning to conform.
- Provide adequate opportunity for city review of all development proposals submitted to the County including lot splits.
- Prohibit waiver of required improvements for divisions of land within annexation areas to insure that standards in the unincorporated areas meet the standards required by the adjacent cities.

3. Urban Development Areas with Potential to Incorporate by 1985

Purpose:

To assist designated communities to expeditiously incorporate before 1985.

Characteristics:

- Area has all fundamental urban facilities and services.
- Area is geographically separated from adjacent cities or is served by separate districts.
- Area has a community identity.
- Area has sufficient economic base for taxing purposes as determined through economic analysis.
- Area has developed into an urban setting of forty percent or more of the holding capacity of the Community Plan.
- There is an expression of community interest for incorporation.

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Policy Actions:

- A reorganization study based upon Urban Development Area priorities will be prepared with assistance of the County as expeditiously as County resources allow. The study will include: (1) A review of the potential for dissolution and/or consolidation of special purpose servicing agencies; (2) a definition of alternative forms of local government appropriate for the area; and (3) shall identify appropriate action recommendations.
- If found appropriate in the reorganization study, application to the Local Agency Formation Commission for an appropriate reorganization to consolidate service provisions in the interim until incorporation is feasible shall be initiated. This may include: (1) Establishment of new districts; (2) dissolution of districts; or (3) consolidation of districts. If the reorganization study indicates incorporation is appropriate immediately, initiate incorporation proceedings.
- These areas shall be targeted for capital facility expenditures where such expenditures would expedite incorporation but not deter the assumption of responsibility for the provision of services.
- Where appropriate, revise community plans to include planned land use designations to include sufficient densities and an appropriate mix of commercial and industrial uses to provide sufficient tax base to make incorporation feasible.
- Municipal Advisory Councils may be established prior to the reorganization study or initiation of the incorporation for the purpose of addressing at the local level municipal issues such as development proposals, levels of police or fire protection or local park and community facility improvement.

4. Urban Development Areas with Potential to Incorporate Beyond 1985

Purpose:

To provide interim structures of government which will provide for cost effective government in the short term, and that will prepare the area for eventual incorporation.

Characteristics:

- Area has all fundamental urban facilities and services.

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- The area is removed from any other urban center.
- The area has a separate and distinct community identity.
- There does not appear to be sufficient economic base as established through the economic analysis to incorporate at this time.
- There is a planned physical expansion area.
- The area has not yet developed into an urban setting of forty percent of the community plan holding capacity.
- The area has an underdeveloped primary circulation system.

Policy Actions:

- Give priority consideration for community plan revision to specifically include an incorporation goal. Revise land use designations so as to provide sufficient densities and an appropriate mix of commercial and industrial uses where necessary to make incorporation feasible.
- Where appropriate, initiate reorganization proceedings in areas where there is expressed community interest in incorporation and where major facilities improvements are needed. For example, consolidation of services through the initiation of a reorganization (i.e., a Community Services District) shall be proposed to LAFCo where there is expressed community interest as indicated through a narrowly defeated incorporation initiative or where there exists the expressed need for major improvements to two primary facilities; sewer, water, fire, schools, roads.
- Target the area for capital facility expenditures where such expenditures would expedite incorporation but not deter the assumption of local responsibility for provision of services.
- Municipal Advisory Councils may be formed to develop local leadership and a sense of community identity. However, County assistance priority should be given to areas with potential to incorporate by 1985.

5. Non-Urban Development Areas with Potential to Incorporated Beyond 1985

Purpose:

To defer inappropriate urban development and proliferation of

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special purpose agencies which may hinder a timely move toward incorporated status.

Characteristics:

- Area may be designated as a Country Town.
- Area does not have all fundamental facilities and services.
- Area is not within an Urban Development Area.
- Area has community identity.
- Area is removed from existing urbanized areas.
- Area has insufficient economic base to incorporate at this time as determined by the economic analysis.
- Area is located within rural or agricultural setting.

Policy Actions:

- Discourage formation of County Service Areas or other special district for other than public health and safety reasons and/or where there will be no growth inducing impact.
- Area Planning Commission may be established to resolve localized planning issues.

6. Non-Urban Development Areas Without Potential to Incorporate

Purpose:

To provide guidelines for the remaining unincorporated area not planned for urbanization.

Characteristics:

- Anadjacent city has not yet expressed interest in annexing the area.
- Area may be designated as a Country Town.
- The area does not have land use or community interest which would be expected to support incorporation.
- The area is not in an Urban Development Area.

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Policy Actions

- Discourage the formation of County Service Areas or other special districts, which would be growth inducing and are for other than public health and safety reasons.
- Do not target the areas for urban level capital facility improvements.
- Discourage land division and rezone applications outside the 1995 line which are conditioned upon annexation to single service districts, especially where annexation to a sewerage agency is involved.

ANALYSIS OF THE MUNICIPAL ORGANIZATION ACT OF 1977

An additional management tool to encourage the timely formation of new cities and annexations to existing cities, the Municipal Organization Act of 1977 (MORGA), became law January 1, 1978. This law contains the most comprehensive reform of California's local government boundary laws since the District Reorganization Act of 1965. MORGA includes a statement of policy and legislative intent that links boundary changes to the need for orderly growth and the logical expansion of cities. It recognizes that a single government agency is preferable to "several limited purpose agencies" for prioritizing community service delivery. The law simplifies the procedures for certain categories of annexations which may be initiated by the County. The proposed Local Government Structure Policy establishes the County's intent to fully utilize the provisions of MORGA to accomplish the goals and objectives of this policy.

The significant changes contained in MORGA are as follows:

1. Island Annexations - MORGA simplifies the annexation of islands by providing that, LAFCO may authorize annexation of an island without an election if:
 - a. the territory does not exceed 100 acres in area and these 100 acres constitute the entire island;
 - b. the territory is surrounded or substantially surrounded by the annexing city, by the annexing city and adjoining cities, by the annexing city and a county boundary, or by the annexing city and the Pacific Ocean;

- c. the territory is substantially developed or developing;
 - d. the territory is not prime agricultural land; and
 - e. the LAFCO finds that such territory to be annexed will benefit from the annexation or is receiving benefits from the annexing city.
2. Public Support - MORGA requires early demonstration of public support for a reorganization proposal. A resolution of the affected city, county, or district or a petition signed by a specified number of registered voters is required before a proposal can be filed with LAFCO. A city which submits a proposal is also required to submit a plan for providing services to the affected area.
3. Payment of Costs - MORGA specifies who will bear the costs of proceedings, as follows:
- a. Annexation or detachment -- the affected city.
 - b. Incorporation (successful) -- the new city; (unsuccessful) -- the county.
 - c. Disincorporation (successful) -- the assets of the dissolved city; (unsuccessful) -- the city proposed to be dissolved.
 - d. Consolidation (successful) -- the successor city; (unsuccessful) -- by the cities involved in proportion to their respective assessed values.
 - e. Reorganization (successful) -- the cities involved; (unsuccessful) -- the county.

4. MORGA eliminates the discretion of a city council to terminate annexation proceedings. It requires the agency conducting the annexation to begin any proceedings within 35 days after LAFCO approves a proposal. If the agency fails to initiate proceedings, the LAFCO can notify the County Board of Supervisors, and the board is required to assume jurisdiction over the proceedings.
5. MORGA provides standard procedures for all annexation elections. An annexation can be approved without an election if less than 25% of the affected registered voters or landowners (who also own less than 25% of the assessed value of the affected land) protest. An election is required if the protestors comprise at least 25%, but less than 50% of either voters or landowners. An uninhabited annexation would be abandoned if landowners owning a majority of the assessed value of the affected land and improvements protest. An inhabited annexation would be abandoned if a majority of the voters in the affected area protest.
6. MORGA requires a majority vote only in the inhabited area to be annexed, unless the area has an assessed value equal to at least half of the total assessed value of land within the affected city; or the number of registered voters residing within the affected territory equals at least half of the number of voters residing in the affected city. Otherwise, a majority vote is required in both the affected territory and the affected city.

7. MORGA also allows the conducting agency to order the detachment of uninhabited territory if there is no majority protest; or to terminate proceedings at its discretion or if landowners owning more than 50% of the assessed value of land and improvements in the affected territory protest.

APPENDIX VI. C.

MAP DISCUSSION

LOCAL GOVERNMENTAL STRUCTURE

The six categories identified in the Local Government Structure Policy are the result of a preliminary staff study based on fiscal analysis. Input from communities has been received by various County Departments relating to the LAFCO Spheres Study, and the identified Spheres of planning interest, in the General Plans of the region's cities.

All the Urban Development Areas identified in the Regional Growth Management Plan have demonstrated some potential to either annex or incorporate. A summary of the Policy classifications follow.

County Islands occur in almost every city in the county. They are the primary targets for encouraging annexation to jurisdictions encompassing them. County Islands are undesirable because of the difficulty of providing services to them.

Urban Development Areas With Potential To Annex cover large areas around metropolitan areas. Urban development which occurs in these fringe areas should be coordinated with the adjacent city or urban community with potential to incorporate. Montgomery is included in this category rather than as a County Island because of its size.

UDA's With Potential To Incorporate By 1985 are established communities which have expressed strong interests in incorporating. Three areas fall into this category:

1. Fallbrook is a full-service, independent community which is pursuing incorporation;

2. Poway is a dependent unincorporated area and;
3. Encinitas is a stable beach community providing a focus for incorporation in San Dieguito.

UDA's With Potential To Incorporate Beyond 1985 are communities developing an identity as a full-service urban community. Such slower-developing urban centers are typified by Lakeside and Ramona.

Non-UDA's With Potential To Incorporate Beyond 1985 are similar to the previous category, but are further removed from existing urban development. These include several Country Towns. Such communities are found in Valley Center, Alpine, Julian, and Borrego Springs.

Non-UDA's Without Potential To Incorporate comprise the remaining Estate and Rural Development Areas and Country Towns. These areas are given no priority regarding eventual annexation or incorporation. Although certain watersheds are included which are recognized as areas of planning influence by some cities, it is anticipated that they will remain unincorporated through the life of the plan.

APPENDIX VII. A. 1.

HOUSING INVENTORY PROFILEUnincorporated Area Share of Regional Housing Stock

The unincorporated area had an estimated 129,728 dwelling units in January 1977. This total represents approximately 21.6 percent of the region's total number of dwelling units. The unincorporated area's share of the regional housing stock has increased since 1970 when the unincorporated area had 18.7 percent. A total of 45,877 units were added in the unincorporated area between 1970 and 1977. This total accounted for 29.8 percent of all additions to the regional housing stock. The housing stock in the unincorporated area increased by 54.7 percent since 1970 compared to a 34.4 percent increase in the region.

Table 1
Dwelling Units by Jurisdiction

	<u>1970-1977</u>			<u>Percent Change</u>
	<u>1970</u>	<u>1977</u>	<u>Change</u>	
Unincorporated	83,851	129,728	45,877	54.7
Incorporated	363,888	472,171	108,283	29.8
Total Region	447,739	601,899	154,160	34.4

Housing Supply Characteristics

In the unincorporated area, there are 93,580 single family detached housing units. This is 72.4 percent of the housing stock. The multi-family total was 19,869 units (15.3 percent) while mobile-homes accounted for 16,009 units (12.3 percent). The largest total

increase in housing occurred in single family detached units. There was a 25,770 unit increase in single family detached units since 1970. The greatest percent increase was 155.6 percent in multi-family units, when 12,092 multi-family units were added to the housing stock. The number of mobilehomes more than doubled, resulting in an increase of 8,015 units. Table 1 below summarizes the change in housing mix. These data indicate that multi-family units and mobilehomes are providing a greater proportion of housing units.

Table 2

Type of Dwelling Unit - Unincorporated Area

	<u>1970-77</u>			
	<u>1970</u>	<u>1977</u>	<u>Change</u>	<u>Percent</u>
Single Family	68,080	93,850	25,770	37.9
Multi-Family	7,777	19,869	12,092	155.6
Mobilehomes	<u>7,994</u>	<u>16,009</u>	<u>8,015</u>	<u>100.3</u>
TOTALS	83,851	129,728	45,877	54.7

Housing Completion

Housing completion data (see Table 3) indicate that the unincorporated area has been providing an increasing share of the single family detached units within the total region. In 1970, 29 percent of the single family units completed were in the unincorporated area. In 1976, this had increased to 46.4 percent of the single family units completed in the region. The trend over this seven year period has been an increase in the unincorporated percentage annually.

In 1970, for multiple family units, 7.7 percent of the total produced in the region were built in the unincorporated area. In 1976, the completions within the unincorporated area increased to 15.5 percent of the County total. However, in 1974 and 1975, the total completions were just less than 25 percent of the total multiple units produced in the region. The trend indicates an increasing percentage of the multiple family units completed in the region are located in the unincorporated area.

Table 3, describing housing unit completions by type, emphasizes the unincorporated area annual additional units compared to the region's.

Trends in Housing Mix

In an overall land use context, it appears that housing structure mix has changed in the last seven years. For example, in 1970, 67.8 percent of the housing units in the region were single family. In 1977, this percentage had dropped to 59.5. In the unincorporated area, the change has not been as dramatic; it has declined from 79.9 percent in 1970 to 72.4 percent in 1977 (see Table 4). In the region, of all the new units added between 1970 and 1977, 35 percent were single family, 56 multiple, and nine percent mobilehomes.

It is recognized that because of the rural character of many areas within the County, single family detached residences will predominate in the future. However, as the County develops its finite urban lands, provisions should be made for housing choice for all residents of the region. The housing structure mix in the candidate

growth areas should reflect the past trends and also recognize the need for multiples to achieve a regional fair share for low and moderate income housing. It is evident from the housing trends of the past seven years that more multiple family units and mobilehomes are providing shelter for residents of the County.

Table 5 indicates the trends in distribution of units added by type by SRA areas between 1970 and 1977. The SRA areas were used because of data availability. These SRA areas included in some cases cities and unincorporated areas and are not coterminous with Community Planning Areas.

The data indicate that there has been significant fluctuation between the subregional areas in the types of housing units added to the housing stock. In the existing urban areas, the new units added have been predominantly multi-family. In excess of sixty percent of the units added in the following areas were multiples:

Central San Diego	140 Percent
Chula Vista	98 Percent
La Mesa	92 Percent
Lemon Grove	81 Percent
Oceanside	70 Percent
El Cajon	68 Percent
South Bay	64 Percent

(See Table 5.)

Mobilehomes in other areas constituted a significant portion of the housing unit increases. For example, over twenty percent of the new units added were mobilehomes in the following areas:

Harbison-Crest	78 Percent
Lakeside	44 Percent
San Marcos	33 Percent
Carlsbad	24 Percent
Jamul	24 Percent
Vista	23 Percent
Fallbrook	20 Percent

Single family units accounted for over seventy percent of the new units in the following areas:

Pauma	103 Percent
Sweetwater	90 Percent
Ramona	87 Percent
Valley Center	85 Percent
East County	84 Percent
Poway	80 Percent
Jamul	79 Percent
Santee	70 Percent

Tenure

Tenure refers to the split between ownership and rental units. Within the region the split is approximately fifty-fifty. In the unincorporated area, this split was 71-29 owner to renter. Since 1970 this split in the unincorporated area has remained relatively constant.

The most current data on tenure is shown on Table 8.

Vacancy Rates

The vacancy rates between 1970 and 1977 have declined indicating a tighter housing market. In 1977, the unincorporated area had 8,932 vacant units for a 7.9 percent vacancy rate, which was down from a rate of 9.2 percent in 1970. The unincorporated vacancy rates have been higher than those in the incorporated area primarily because there are more vacant second homes located in the unincorporated area.

TABLE 3

HOUSING COMPLETIONS BY TYPE

1970-76

YEAR	UNINCORPORATED		PERCENT OF TOTAL COUNTY		TOTAL COUNTY	
	Single Family Detached	Multi	Single Family Detached	Multi	Single Family Detached	Multi
1970	2,990	1,026	29%	7.7%	10,337	13,335
1971	3,746	2,119	28.6%	13.7%	13,124	15,585
1972	4,432	1,613	31.8%	10%	13,968	16,074
1973	4,513	1,750	38.6%	12.8%	11,742	13,730
1974	4,795	2,388	43.6%	23.4%	11,039	10,289
1975	3,556	1,613	43.9%	23.7%	8,184	6,868
1976	4,364	1,147	46.4%	15.5%	9,451	7,423

Source: Economic Research Bureau of San Diego Chamber of Commerce,
from CPO -- INFO - 77, March 1977, No. 2

TABLE 4

DISTRIBUTION OF HOUSING UNITS
BETWEEN CITIES AND UNINCORPORATED AREAS
BY TYPE 1970, 1975, 1977

	<u>Single</u>	<u>Multiple</u>	<u>Mobile Home</u>	<u>Total</u>
<u>1970</u>				
Total County	67.8 305,467	27.5 123,694	4.7 21,372	100% 450,533
Unincorporated	79.9 69,249	10.9 9,420	9.2 8,008	100% 86,677
Incorporated	64.9 236,218	31.4 114,274	3.7 13,364	100% 363,856
<u>1975</u>				
Total County	60.0 347,269	33.7 195,111	6.3 36,519	100% 578,899
Unincorporated	72.6 89,782	15.7 19,411	11.7 14,441	100% 123,634
Incorporated	56.5 257,465	38.6 175,700	4.9 22,078	100% 455,265
<u>1977</u>				
Total County	59.5 358,304	34.5 207,826	6.0 35,769	100% 601,899
Unincorporated	72.4 93,850	15.3 19,869	12.3 16,009	100% 129,728
Incorporated	56.0 264,454	39.8 187,957	4.2 19,760	100% 472,171

Source: Population and Housing Estimates, Integrated Planning Office,
1977 Data.

U. S. Census, 1970, 1975 Data

TABLE 5
DISTRIBUTION OF HOUSING UNITS
ADDED BY TYPE BETWEEN 1970-1977

Subregional Area	Total (Net Change Between 1970-77)	Single Family Detached	Percent of Total	Multiple	Percent of Total	Mobile- Homes	Percent of Total
Central S.D.	13,137	-5,309	-40%	18,449	140%	114	1%
North City	48,934	24,584	50	23,660	48	727	2
Poway	6,642	5,337	80	866	13	439	7
Other N. City Areas	42,292	19,257	45	22,794	54	288	1
South Suburban	13,174	4,042	31	8,453	64	702	5
Sweetwater	2,585	2,321	90	76	3	188	7
Chula Vista	4,869	27	0	4,699	98	153	2
South Bay	5,721	1,693	30	3,678	64	360	6
East Suburban	31,894	12,899	40	13,926	44	5,112	16
Jamul	464	367	79	-14	-3	111	24
Spring Valley	4,210	2,293	54	1,474	35	443	11
Lemon Grove	587	134	23	480	81	-26	-4
La Mesa	4,455	374	7	4,087	92	33	1
El Cajon	9,132	2,236	24	6,174	68	737	8
Santee	5,781	4,055	70	866	15	860	15
Lakeside	3,796	1,460	38	699	18	1,637	44
Harbison Crest	1,335	313	23	-18	-1	1,040	78
Alpine	590	405	68	99	17	86	15
Ramona	1,469	1,278	87	87	6	104	7
North County	42,959	15,817	37	19,723	46	7,463	17
Escondido	8,900	3,283	37	3,870	43	1,756	20
San Marcos	5,183	2,662	51	812	16	1,710	33
San Dieguito	9,220	3,835	42	5,073	55	314	3
Carlsbad	5,471	1,383	26	2,777	50	1,311	24
Oceanside	9,019	2,054	23	6,295	70	691	7
Fallbrook	2,536	1,468	58	566	22	502	20
Vista	4,547	1,437	32	2,050	45	1,069	23
Valley Center	707	602	85	-28	-4	133	19
Pauma	273	280	103	2	0	-9	-3
East County	1,037	873	84	-120	-12	284	28
Total County	152,139	52,947	35	85,059	56	14,402	9

TABLE 6
DISTRIBUTION OF HOUSING UNITS
BY TYPE IN SAN DIEGO REGION
1970

<u>Subregional Area</u>	<u>Total</u>	<u>Single Family Detached</u>	<u>Percent</u>	<u>Multiple</u>	<u>Percent</u>	<u>Mobile- homes</u>	<u>Percent</u>
Central S.D.	160,958	99,521	62%	59,836	37%	1,484	1%
North City	96,306	68,517	71	25,884	27	1,868	2
Poway	4,381	3,788	87	271	6	318	7
Other N. City Areas	91,925	64,729	70	25,613	28	1,550	2
South Suburban	44,266	28,452	64	10,798	25	4,993	11
Sweetwater	3,659	3,624	99	29	1	3	0
Chula Vista	26,338	14,786	56	8,137	31	3,405	13
South Bay	14,269	10,042	70	2,632	19	1,585	11
East Suburban	74,121	54,455	74	12,905	17	6,718	9
Jamul	964	877	91	16	2	71	7
Spring Valley	8,876	7,547	85	521	6	804	9
Lemon Grove	7,486	6,000	80	1,172	16	313	4
La Mesa	16,667	11,741	71	4,379	26	535	3
El Cajon	22,381	14,347	64	5,716	26	2,303	10
Santee	5,650	4,254	75	159	3	1,236	22
Lakeside	7,014	5,464	78	589	8	953	14
Harbison Crest	1,814	1,526	84	62	3	226	13
Alpine	1,277	904	71	199	16	168	13
Ramona	1,992	1,791	90	92	5	109	5
North County	70,264	50,204	71	13,982	20	6,034	9
Escondido	17,941	12,773	71	2,963	17	2,163	12
San Marcos	2,368	1,923	81	195	8	249	11
San Dieguito	9,546	7,644	80	1,462	15	438	5
Carlsbad	5,812	4,062	70	1,504	26	246	4
Oceanside	14,975	9,336	63	4,364	29	1,254	8
Fallbrook	4,457	3,467	78	450	10	540	12
Vista	10,293	8,252	80	1,266	12	766	8
Valley Center	1,384	1,001	72	76	6	307	22
Pauma	596	559	94	13	2	24	4
East County	4,883	4,246	87	362	7	270	6
Total County	450,798	305,395	68	123,767	27	21,367	5

Source: Population & Housing Estimates, IPO, 1977 Data; U. S. Census, 1970 Data.

TABLE 7
DISTRIBUTION OF HOUSING UNITS
BY TYPE IN SAN DIEGO REGION
1977

<u>Subregional Area</u>	<u>Total</u>	<u>Single Family Detached</u>	<u>Percent</u>	<u>Multiple</u>	<u>Percent</u>	<u>Mobile- homes</u>	<u>Percent</u>
Central San Diego	174,095	94,212	54%	78,285	45%	1,598	1%
North City	145,240	93,101	64	49,544	34	2,595	2
Poway	11,022	9,128	83	1,137	10	757	7
Other N. City Areas	134,218	83,973	63	48,407	36	1,838	1
South Suburban	57,440	32,494	56	19,251	34	5,695	10
Sweetwater	6,243	5,946	95	105	2	192	3
Chula Vista	31,207	14,813	48	12,836	41	3,558	11
South Bay	19,990	11,735	59	6,310	31	1,945	10
East Suburban	106,015	67,354	64	26,831	25	11,830	11
Jamul	1,425	1,241	87	2	0	182	13
Spring Valley	13,173	9,844	75	1,995	15	1,334	10
Lemon Grove	8,073	6,134	76	1,652	20	287	4
La Mesa	21,122	12,088	57	8,466	40	568	3
El Cajon	31,513	16,583	52	11,890	38	3,040	10
Santee	11,431	8,310	73	1,025	9	2,096	18
Lakeside	10,810	6,932	64	1,288	12	2,590	24
Harbison Crest	3,149	1,839	58	44	1	1,266	41
Alpine	1,866	1,314	70	298	16	254	14
Ramona	3,453	3,069	89	171	5	213	6
North County	113,223	66,021	58	33,705	30	13,497	12
Escondido	26,841	16,056	60	6,833	25	3,952	15
San Marcos	7,551	4,585	61	1,007	13	1,959	26
San Dieguito	18,766	11,479	61	6,535	35	752	4
Carlsbad	11,283	5,445	48	4,281	38	1,557	14
Oceanside	23,994	11,390	48	10,659	44	1,945	8
Fallbrook	6,993	4,935	71	1,016	14	1,042	15
Vista	14,840	9,689	66	3,316	22	1,835	12
Valley Center	2,089	1,603	77	46	2	440	21
Pauma	866	839	98	12	1	15	1
East County	5,880	5,122	87	210	4	554	9
Total County	601,899	358,304	59	207,826	35	35,769	6

Source: Population & Housing Estimates, IPO, 1977 Data; U. S. Census, 1970 Data.

TABLE 8
HOUSING UNITS BY TENURE

	<u>ALL UNITS</u>			<u>SINGLE FAMILY UNITS</u>		
	<u>Owner-Occupied</u>	<u>Total Units</u>	<u>% Owner-Occupied</u>	<u>Owner-Occupied</u>	<u>SF Units</u>	<u>% Owner-Occupied</u>
Central San Diego	62,570	172,112	36.0	53,823	71,393	75.5
North City	80,385	144,790	55.5	70,454	86,122	81.8
Poway	8,244	11,610	70.6	7,438	9,210	80.8
Other N. City Areas	72,141	133,180	54.2	63,016	76,912	81.9
South Suburban	26,022	53,846	48.3	23,667	29,892	79.2
Sweetwater	6,426	7,937	81.0	5,951	7,056	84.3
Chula Vista	11,448	27,197	42.1	10,220	12,609	81.1
South Bay	8,148	18,712	43.3	7,496	10,227	73.3
East Suburban	56,425	99,561	56.7	52,714	62,598	84.2
Jamul	1,142	2,154	53.0	1,537	992	64.5
Spring Valley	8,454	12,413	67.7	8,025	9,582	83.8
Lemon Grove	5,054	7,988	63.3	4,667	5,587	83.5
La Mesa	10,652	20,895	50.9	9,548	11,137	85.7
El Cajon	13,440	30,010	44.7	12,696	15,257	83.2
Santee	7,294	10,020	72.8	6,598	7,830	84.3
Lakeside	6,141	8,997	68.5	5,669	6,839	82.9
Harbison-Crest	1,283	1,801	71.1	1,203	1,515	79.4
Alpine	925	1,759	52.6	861	1,132	76.1
Ramona	2,040	3,524	57.9	1,910	2,727	70.0
North County	54,623	105,781	51.7	47,621	64,869	73.4
Escondido	12,573	24,225	51.6	11,651	15,473	75.3
San Marcos	3,759	5,769	65.1	3,455	4,544	76.0
San Dieguito	10,346	19,089	54.2	8,402	11,377	73.9
Carlsbad	4,872	11,410	42.1	3,949	5,746	68.7
Oceanside	10,254	22,397	45.7	8,479	12,088	70.1
Fallbrook	3,508	6,418	54.7	3,155	4,432	71.2
Vista	7,932	13,853	57.2	7,526	9,683	77.7
Valley Center	1,105	1,903	57.9	832	1,222	68.1
Pauma	274	717	38.2	172	304	56.6
East County	1,568	4,591	34.1	1,321	3,364	39.3
Total County	281,593	580,681	48.5	249,640	318,238	78.4

Source: Land Use Information Systems, County of San Diego, March 1977.

Tenure data based upon recorded homeownership exemptions. Mobilehomes not included.

TABLE 9

VACANCY RATES

	<u>Percent 1970</u>	<u>Percent 1977</u>
Unincorporated	9.2	7.9
Incorporated	5.6	4.4
Total Region	6.4	5.1

Source: IPO Bulletin

The vacancy rates for apartment units are significantly lower than those reported above. A recent survey by Apartment and Rental Owners Association (AROA) indicated that the vacancy factor was 3.8 percent. This estimate was based upon members of the AROA representing a total of 22,595 units in the region; This study did not break down the rental rate within the unincorporated area.

The actual vacancy rate in the region is better reflected by the AROA data because it more clearly indicates those units actually for rent. The IPO data includes second home vacancies and other units not available for rent.

The trends in vacancy rates are shown in Table 10.

TABLE 10
SAN DIEGO VACANCY RATES

<u>Year</u>	<u>Vacancy Rate</u>
1970	3.9
1971	6.8
1972	9.7
1973	6.1
1974	5.3
1975	4.3
1976	2.8
1977	3.8

Source: AROA, 1977 Vacancy Survey.

Housing Condition

In 1975 it was estimated that 96.8 percent of the housing stock in the unincorporated area was sound. Approximately 4,000 units were either deteriorating (3,428) or dilapidated (587) (see Table 11). The attached chart indicates the location of these deteriorated units.

The large number of units in poor condition are in the rural lower density eastern areas of the County. Many of these units are being held as second homes, vacant but not available to buy or rent, or used for other temporary purposes.

Of the deteriorated units, 468 (13.7 percent) are multiple family units and 2,960 (86.3 percent) are single family.

TABLE 11
RANKING OF SUBREGIONAL AREAS
BY NUMBER OF SUBSTANDARD UNITS: 1975

	<u>Total Substandard Units</u>	<u>Deteriorating Single Family</u>	<u>Multiple Family</u>	<u>Dilapidated/ Inadequate Original Construction</u>
*MSA-5	629	438	42	146
Spring Valley	531	434	36	61
San Dieguito	442	286	88	68
Fallbrook	305	235	54	16
Lakeside	231	186	17	28
Lemon Grove	203	144	37	22
El Cajon	192	127	40	25
Santee	140	100	13	27
Ramona	137	99	27	11
Harbison-Crest	117	92	2	23
Escondido	105	92	6	7
Sweetwater	85	56	6	23
Jamul	77	63	0	14
Alpine	61	47	11	3
Valley Center/Pauma	52	46	0	6
Poway	<u>34</u>	<u>27</u>	<u>1</u>	<u>6</u>
Subtotal	3,341	2,473	380	488
Remainder Unincorporated Area	<u>674</u>	<u>487</u>	<u>88</u>	<u>99</u>
TOTALS	4,015	2,960	468	587

Source: 1975 Special Census

*Major Statistical Area 5 (MSA-5) encompasses the eastern portion of the County and included the following Subregional Areas: Palomar-Julian, Laguna-Pine Valley, Mountain Empire and Borrego Springs. Due to their low density characteristics, these five SRA's are aggregated for the purpose of analysis.

APPENDIX VII. A. 2.

HOUSING COSTS

The gap between the cost of housing and what people can afford to pay is growing. This problem is evident in existing as well as new housing. The national standard is that a household should pay no more than 25% of their gross household income for all housing costs. This figure is based on having a minimum amount of money to pay for other basic necessities such as food, clothing, medical care, and transportation. Similar standards are generally used by most lending institutions in determining what mortgage payments a family can be safely expected to meet.

Higher income households can afford to pay a higher percentage of income for housing and still afford other necessities. They may spend more out of choice. However, lower and middle income households are forced to spend very high proportions of their income for housing, because housing is not available at the prices or rents they can afford.

The average home in San Diego cost more than \$68,000 in October.¹ Only about 15% - 20% of the region's households can afford housing at this price. The trends have clearly indicated that fewer households are able to purchase homes today than in 1970. A recent study completed by the Southern California Association of Governments² showed that in 1970 a family with an income of \$10,000

1. San Diego Economic Bulletin, December, 1977

2. Draft Regional Housing Element, Part I, October, 1977, Southern California Association of Governments.

could afford to buy nearly half of the houses in Southern California. The equivalent family in 1977 earns \$15,000 but can afford to buy only 14% of the region's houses. It was estimated that about 1.5 million families in Southern California who could have afforded housing in 1970 could not do so today. (These figures do not take into account higher interest rates, insurance rates, and property taxes which even further reduce the percentage of housing units available at each income level).

This dramatic increase in the price of homes relative to incomes is causing many serious problems. (Chart 1).

Chart 1

<u>Year</u>	<u>Median₁ Income</u>	<u>Affordable₂ Home</u>	<u>Average Priced Home₃</u>	<u>Difference</u>
1974	\$10,982	\$27,460	\$40,265	\$12,805
1975	11,531	28,830	45,690	16,860
1976	12,107	30,270	52,280	22,010
1977	12,713	31,780	68,000	36,220

These problems include:

1. Tremendous pressure on the rental housing stock. In 1977, the estimated vacancy factor is 3.8%
2. Virtually all low, moderate, and most middle-income households who do not already own their own homes are prevented from becoming homeowners. This particularly impacts younger families.

1. 1975 Special Census. Projections for 1975, 76, 77 based upon median income change between 1968-74; 5% per year.
2. Income/Cost Rule: $2.5 \times \text{Annual Income}$
3. Housing Impacts, September, 1977
San Diego Economic Bulletin, November, 1976, December, 1977
Federal Home Loan Bank

3. Values of property increase causing property taxes to rise, thereby increasing the costs of home ownership for many long-time owners, who cannot afford to keep their homes.
4. As more money is drawn into mortgage payments and taxes, less is available for maintenance and repairs.
5. It drastically reduces mobility and choice for current homeowners even those with relative high incomes.

Costs of Homeownership

At the national level, the increase in the costs of home ownership is greater than the consumer price index and median family income. The total costs of home ownership has increased significantly in the last ten years. The occupancy costs of the same quality single-family house has increased by 128.6 percent between 1967 and 1976 more rapidly than general prices while rental prices have lagged behind. The average ratio of home ownership costs to general prices for U.S. cities is 1.3 to 1.0. In San Diego, this ratio of home ownership costs to general prices is much higher, 1.8 to 1.0 (Table 15). This ratio is the highest in the nation.

The increase in sales price has been the single most important contributor to the increase in total occupancy costs. Although operating expenses increased at a greater percentage than sales price, the sales price represents the largest proportion of the total cost. Its contribution to the growth in occupancy cost is much larger than any other factor (Table 16).

Cost of New Housing

The cost of new housing in San Diego has increased over one hundred

percent between 1970 and 1977. The major components of the development costs for new housing are land costs (raw land + site improvements), hard construction costs, and financing costs (see Tables 13 and 14).

The distribution of costs that make up the total purchase price can vary greatly from project to project within the same housing market, depending upon location, density, site specific limitations, and local market conditions. The costs given in this report are approximations and the most important data are differential not specific dollar values.

The trends in the cost of housing indicate that the greatest percentage increases occurred in improved lot costs (160 percent), financing (175 percent), and fees (690 percent). The distribution of costs (Table 14) indicates that the finished lot costs are becoming an increasingly larger percent of the total housing costs. In 1970, the lot costs were 27 percent of the total housing costs while in 1977 these costs rose to 35 percent. In comparison, the hard construction costs were 46 percent of the total costs in 1970 and 39 percent in 1977. Fees increased from one percent in 1970 to four percent in 1977 of the total costs of new housing.

The impact of delays on the total cost of new housing has been contributed to the increased cost of housing. It was estimated by the local Construction Industry Coordinating Council that delays can add between 1.1 percent to 1.8 percent per month to the total cost of new housing.

The trends at the national level, even though different than San Diego estimate, confirm this trend. Land acquisition and site preparation costs are becoming an increasingly larger component of total housing costs.

The table below indicates the total change in the proportion of costs of building a single family home.

TABLE 12
DISTRIBUTION OF SINGLE FAMILY HOME COSTS
BY MAJOR CATEGORY

	<u>1949</u>	<u>1969</u>	<u>1974</u>	<u>1977</u>	<u>Change in Share Total Cost</u>
Land Acquisition and Preparation	11.0%	21.4%	24.6%	25.0%	127.2%
Structure	69.0%	54.6%	48.4%	46.7%	-32.3%
Building Materials 45.0%			30.0%		-33.3%
On-site Labor 24.0%			16.7%		-30.4%
Financing	5.0%	7.0%	10.0%	10.8%	116.0%
Overhead and Profit	<u>15.0%</u>	<u>17.0%</u>	<u>17.0%</u>	<u>17.5%</u>	16.6%
TOTAL COST	100.0%				

Source: National Association of Homebuilders, Sixth of a Series in the Washington Star by Michael Sumichrast, March 4 - April 15, 1977.

This information together with local data provided by the building industry indicate strongly that the cost of a finished lot is becoming an increasingly large component of the final cost of dwelling.

TABLE 13

Cost Differentials
 Typical 1200 Sq. Ft. Detached Home
 San Diego County
 1970 - 1975

<u>Item</u>	<u>1970</u>	<u>1975</u>	<u>1977</u>	<u>Percent Increase 1970-77</u>
Improved Lot	\$ 7,000	\$15,000	\$18,200	160%
Hard Construction	12,000	18,000	20,400	70%
Financing	1,230	2,775	3,385	175%
Marketing	1,300	2,245	2,865	120%
Permit Fees	250	1,500	2,000	690%
Administration	1,000	1,000	1,000	0
Total Cost	22,980	40,820	47,850	151%
Profit	<u>2,920</u>	<u>4,080</u>	<u>4,545</u>	<u>50%</u>
Sales Price	25,900	44,900	52,395	

1970-75 -- Data provided by Sanford Goodkin Research Corporation

1977 - -- Is a straight line estimate of cost increases. It is probably on the low side because land costs have increased more rapidly from 1975-77 than 1970-77.

TABLE 14

Distribution of Costs
for a Typical Detached Home
1970 - 77

	<u>1970</u> 27%	<u>1975</u> 33%	<u>1977</u> 35%
Improved Lot			
Hard Construction	46	40	39
Job Supervision	1	1	1
Financing	5	6	6
Marketing	5	5	5
Permit Fees	1	3	4
Administration	4	2	2
 Total Costs	 89	 91	 92
 Sales Price	 100%	 100%	 100%
 Average Sales Price	 \$25,900	 \$44,900	 \$52,400

1. Source: 1970 and 1975 data is from Sanford Goodkin Research Corporation.

1977 data is an estimate based on 1970-75 trends

TABLE 15

A GEOGRAPHIC COMPARISON OF RENTS, HOMEOWNERSHIP COSTS,
AND GENERAL PRICESCONSUMER PRICE INDEX
1967 - 1976

	<u>General Prices</u>	<u>Rent</u>	<u>Home- ownership</u>	<u>Ratio Of Homeownership Costs To General Prices</u>
<u>U. S. City Average</u>	70.5%	44.7%	91.7%	1.30 to 1.0
<u>Northeast</u>				
Baltimore	70.4	32.8	112.6	
Boston	72.4	54.4	74.6	
Buffalo	67.2	46.7	69.9	
New York/New Jersey	72.7	-	95.1	
Philadelphia	69.1	51.7	94.3	
Pittsburgh	64.1	32.4	88.9	
Washington, D. C.	<u>67.0</u>	<u>45.8</u>	<u>80.9</u>	
Regional Mean	69.0	44.0	88.0	1.28 to 1.0
<u>North Central</u>				
Chicago	60.5	35.4	71.4	
Cincinnati	67.1	23.0	99.6	
Cleveland	65.1	28.0	65.6	
Detroit	65.9	-	83.2	
Kansas City	63.4	22.3	90.3	
Milwaukee	62.5	41.4	60.5	
Minneapolis	67.1	37.5	92.7	
St. Louis	<u>62.7</u>	<u>19.0</u>	<u>76.4</u>	
Regional Mean	64.3	29.5	80.0	1.24 to 1.0
<u>South</u>				
Atlanta	66.6	30.6	90.6	
Dallas	63.7	26.3	90.0	
Houston	<u>72.3</u>	<u>31.6</u>	<u>111.0</u>	
Regional Mean	67.5	29.5	97.2	1.44 to 1.0
<u>West</u>				
Los Angeles-Long Beach	64.7	39.2	95.8	
San Diego	67.3	54.8	116.3	
San Francisco-Oakland	65.5	50.4	93.2	
Seattle	<u>61.7</u>	<u>37.0</u>	<u>90.7</u>	
Regional Mean	64.8	45.2	99.0	1.53 to 1.0

Source: Trends in the Real and Financial Cost of Housing: An Overview,
Arthur P. Solomon, FHCB Conference, December, 1977.

TABLE 16

CHANGES IN COMPONENTS OF HOMEOWNERSHIP COST
FIXED QUALITY NEW HOMES

1967 - 1976

	<u>Total Monthly Cost</u>	<u>Sales Price¹</u>	<u>Interest Rate²</u>	<u>Monthly Mortgage Payment³</u>	<u>Monthly Operating Cost⁴</u>
1967	\$206	\$24,600	6.46%	\$129	\$77
1968	225	25,900	6.97	137	88
1969	249	27,900	7.81	159	90
1970	268	28,900	8.45	173	95
1971	282	30,300	7.74	172	110
1972	299	32,200	7.60	180	119
1973	335	35,600	7.95	205	131
1974	388	38,900	8.92	243	145
1975	428	42,900	9.01	268	161
1976	470	47,100	8.99	290	180
Percent Change <u>1967-77</u>		91.5	39.1	124.8	133.8

-
1. Average sales price of new one-family standardized houses from Construction Reports, C-27, "Price Index of New One-Family Houses Sold," U. S. Bureau of the Census.
 2. "Security Rates and Yields" from the Federal Home Loan Bank Board Journal, statistical series. It is noted, "Average effective interest rates: those prior to 1973 not comparable with later priods due to revision in series, effective January 1973." Figures are for convention new home mortgages.

Table 16 - Footnotes Continued

3. Mortgages assumed to be 75 percent of purchase price. Mortgage term fixed for 25 years. From these and the effective mortgage interest rate monthly mortgage payments were computed.
4. The operating costs include hazard insurance, property taxes, maintenance and repair, and heat and utilities. In order to determine the dollar amount the specific expenditures for each separate year were used for an FHA-insured home of a price comparable to the sales price the fixed quality unit for that year. Thus, the average monthly operating costs are derived from Specific Characteristics by Total Acquisition Cost, New One Family Occupant Purchase Homes, Section 203, HUD Statistical.

Source: Trends in the Real and Financial Cost of Housing: An view, Arthur P. Solomon, FHCB Conference, December, 1977.

TABLE 17

A COMPARISON OF TRENDS IN HOUSING OCCUPANCY COSTS, GENERAL PRICES,
AND MEDIAN FAMILY INCOME - 1967-1976

	<u>Home Ownership Index</u> ¹	<u>Rental Index</u> ¹	<u>Median Family Income</u> ²	<u>Consumer Price Index</u>
1967	100.0	100.0	\$7,974	100.0
1968	105.7	102.4	8,632	104.2
1969	116.0	105.7	9,433	109.8
1970	128.5	110.1	9,867	116.3
1971	113.7	115.2	10,285	121.3
1972	140.1	119.2	11,116	125.3
1973	146.7	124.3	12,051	133.1
1974	163.2	130.6	12,902	147.7
1975	181.7	137.3	13,719	161.2
1976	<u>191.7</u>	<u>144.7</u>	<u>14,500 (est)</u>	<u>170.5</u>

Percent Change

1967-1971	33.7	15.2	28.7	21.3
1972-1976	-	-	30.6	26.1
1967-1976	91.7	44.7	81.2	70.5

1. U.S. Department of Labor, Bureau of Labor Statistics,
Consumer Price Index

2. U.S. Bureau of the Census, Current Population Reports,
"Consumer Incomes: Money Income of Families and Persons
in the United States," Series P-60.

Source: Trends in the Real and Financial Cost of Housing: An Over-
view, Arthur P. Solomon, FHCB Conference, December, 1977.

TABLE 18

COMPARATIVE INCREASES IN HOUSING COST FACTORS
CONSUMER PRICE INDEX FOR SELECTED ITEMS

1967 - 1977 (Second Quarter)

U. S. City Average

Year	Rent	Home- ownership	Mortgage Interest Rates	Property Taxes	Property Insurance Rates	Maintenance and Repair	Fuel and Utilities		
							Fuel Oil and Coal	Gas	Electricity
1967	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1968	102.4	105.7	106.7	105.6	104.7	106.1	103.1	101.0	100.9
1969	105.7	116.0	120.0	111.9	109.3	115.0	105.6	102.8	102.8
1970	110.1	128.5	132.1	121.0	113.4	124.0	110.1	108.5	106.2
1971	115.2	133.7	120.4	131.1	119.0	133.7	117.5	116.2	113.2
1972	119.2	140.1	117.5	145.7	123.2	140.7	118.5	122.3	118.9
1973	124.3	146.7	123.2	152.3	124.4	151.0	136.0	127.9	124.9
1974	130.6	163.2	140.2	151.2	124.2	171.6	214.6	143.9	147.5
1975	137.3	181.7	142.1	158.8	131.4	187.6	235.3	172.5	167.0
1976	144.7	191.7	140.9	167.6	144.3	199.6	250.8	201.2	177.6
1977	<u>151.5</u>	<u>201.1</u>	<u>137.3</u>	<u>180.2</u>	<u>152.1</u>	<u>211.4</u>	<u>280.4</u>	<u>234.5</u>	<u>186.5</u>
Percent Change 1967- <u>1977</u>	51.5	101.1	37.3	80.2	52.1	111.4	180.4	134.5	86.5

Source: Trends in the Real and Financial Cost of Housing:
An Overview, Arthur P. Solomon, FHCB Conference,
December 1977.

TABLE 19
EXISTING AND PROPOSED DISTRIBUTION OF DWELLING UNITS
BETWEEN URBAN DEVELOPMENT AREAS

	EXISTING						DEVELOPMENT CAPABILITY						HOLDING CAPACITY					
	Low-SFD ¹	%	Medium & High ²	%	Total	%	Low-SFD	%	Medium & High	%	Total	%	Low-SFD	%	Medium & High	%	Total	%
<u>South & East County</u>																		
Santee	9,500	13	5,000	16	14,500	14	7,600	12	14,700	35	22,300	21	17,100	12	19,700	27	38,800	18
Lakeside	7,000	9	5,200	17	12,200	12	3,400	5	3,500	8	6,900	7	10,400	8	8,700	12	19,100	9
Valle de Oro	16,200	22	3,700	12	19,900	19	8,100	13	13,900	33	22,000	21	24,300	18	17,600	24	41,900	20
Montgomery	2,800	4	5,200	17	8,000	8	300	0	1,100	3	1,400	1	3,100	2	6,300	9	9,400	4
Sweetwater	3,000	4	200	0	3,200	3	1,000	2	--	0	1,000	1	4,000	3	200	--	4,200	2
Subtotal	38,500	52%	19,300	62%	57,800	56%	20,400	32%	33,200	79%	53,600	51%	58,900	43%	52,500	72%	111,400	53%
<u>North County</u>																		
Fallbrook	4,400	6	1,500	5	5,900	6	4,000	6	1,500	4	5,500	5	8,400	6	3,000	4	11,400	5
N. County Metro	5,100	7	2,000	6	7,100	7	17,300	27	800	2	18,100	17	22,400	16	2,800	4	25,200	12
Escondido Fringe	3,700	5	--		3,700	4	2,300	4	--		2,300	2	6,000	4	--		6,000	3
Ramona	2,600	4	700	2	3,300	3	3,700	6	100	0	3,800	4	6,300	2	800	1	7,100	3
San Dieguito	11,800	16	6,200	20	18,000	17	7,900	13	4,700	11	12,600	12	19,700	14	10,900	15	30,600	15
Poway	7,700	10	1,400	5	9,100	9	7,500	12	1,600	4	9,100	9	15,200	11	3,000	4	18,200	9
Subtotal	35,300	48%	11,800	38%	47,100	46%	42,700	68%	8,700	21	51,400	49%	78,000	57	20,500	28%	98,500	47
TOTAL	73,800	100%	31,100	100%	104,900	102% ³	63,100	100%	41,900	100%	105,000	100%	136,900	100%	73,000	100%	209,900	100%

1. Categories 1-5 on General Plan; 1 du/ac to 7.3 du/ac
2. Categories 6-8 on General Plan; 7.0 du/ac to 29 du/ac; including mobilehomes
3. Some columns do not sum to 100% because of rounding

TABLE 20
EXISTING AND PROPOSED DISTRIBUTION OF DWELLING UNITS
WITHIN URBAN DEVELOPMENT AREAS

	EXISTING						DEVELOPMENT CAPABILITY						HOLDING CAPACITY					
	Low-SFD ¹	%	Medium & High ²	%	Total	%	Low-SFD	%	Medium & High	%	Total	%	Low-SFD	%	Medium & High	%	Total	%
<u>South & East County</u>																		
Santee	9,500	66	5,000	34	14,500	100	7,600	34	14,700	66	22,300	100	17,100	46	19,700	54	36,800	100
Lakeside	7,000	57	5,200	43	12,200	100	3,400	49	3,500	51	6,900	100	10,400	54	8,700	46	19,100	100
Valle de Oro	16,200	81	3,700	19	19,900	100	8,100	58	13,900	42	22,000	100	24,300	58	17,600	42	41,900	100
Montgomery	2,800	35	5,200	65	8,000	100	300	21	1,100	79	1,400	100	3,100	33	6,300	67	9,400	100
Sweetwater	3,000	94	200	6	3,200	100	1,000	100	--	0	1,000	100	4,000	95	200	5	4,200	100
Subtotal	38,500	67%	19,300	33%	57,800	100%	20,400	38%	33,200	62%	53,600	100%	58,900	53%	52,500	47%	111,400	100%
<u>North County</u>																		
Fallbrook	4,400	75	1,500	25	5,900	100	4,000	73	1,500	27	5,500	100	8,400	74	3,000	26	11,400	100
N. County Metro	5,100	72	2,000	28	7,100	100	17,300	96	800	4	18,100	100	22,400	89	2,800	11	25,200	100
Escondido Fringe	3,700	100	--	0	3,700	100	2,300	100	--	0	2,300	100	6,000	100	--	0	6,000	100
Ramona	2,600	79	700	21	3,300	100	3,700	97	100	3	3,800	100	6,300	89	800	11	7,100	100
San Dieguito	11,800	66	6,200	34	18,000	100	7,900	63	4,700	37	12,600	100	19,700	64	10,900	36	30,600	100
Poway	7,700	85	1,400	15	9,100	100	7,500	82	1,600	18	9,100	100	15,200	84	3,000	16	18,200	100
Subtotal	35,300	75%	11,800	25%	47,100	100%	42,700	83%	8,700	17%	51,400	100%	78,000	79%	20,500	21%	98,500	100%
TOTAL	73,800	70%	31,100	30%	104,900	100%	63,100	60%	41,900	40%	105,000	100%	136,900	65%	73,000	35%	209,900	100%

1. Categories 1-5 on General Plan; 1 du/ac to 7.3 du/ac.
2. Categories 6-8 on General Plan; 7.0 du/ac to 29 du/ac; including mobilehomes.

APPENDIX VII. A. 3.

MODERATELY PRICED DWELLING UNIT ORDINANCE

The justification for a moderately priced dwelling unit ordinance is based upon the principle of encouraging homeownership in new subdivisions within the Urban Development Areas. This homeownership will be available to individuals of moderate income. The developer shall be permitted smaller lots and therefore higher densities in return for selling fifteen percent of the units at below market prices.

Included in this section are:

1. Outline of purpose.
2. Income data and affordable home prices.
3. Current data on housing prices - attached vs. detached.
4. Estimate of housing cost with and without MPDU Ordinance.
5. Typical subdivision with and without ordinance.
6. Copy of draft MPDU Ordinance.

A reduction of approximately twenty percent in the selling price of a MPDU home can be achieved with the implementation of an inclusionary ordinance (from \$63,400 to \$52,100). A thorough analysis of the implications of this ordinance of the cost factors of production should accompany review of this ordinance. For example, the "site improvement" and "marketing and sales" components of total cost could be lower than estimated in this report. Higher densities could produce savings greater than estimated for per unit site improvement costs; streets, water and sewer mains must be the same size whether 6,000 square foot lots or the 4,000 square foot lots envisioned are built upon. The need for marketing and sales expenditures

could be reduced in the BMP units because there will be potentially little difficulty in finding a buyer.

Additionally, the increased land costs and site development costs could rise in the future. Adjustments between these factors would have to be considered before the establishment of a sales price by the County.

ESTIMATE OF HOUSING COST
IN TYPICAL SUBDIVISION
WITHOUT MPDU ORDINANCE

Lot Size:	6,000 Square Feet
Dwelling Size:	1,200 Square Feet
Subdivision Size:	103 Lots; 20 Acres
Density:	5.15 Dwelling Units/Acre (gross)
Raw Land Price	\$60,000/Acre

Cost Factors

Land Price	\$11,650
Site Improvements	8,060
Construction (\$25.00/Square Foot)	30,000
Permit Fees	1,600
Marketing and Sales	1,800
Financing	4,390
Administration	1,050
Pretax Profit	<u>5,860</u>

\$64,410

ESTIMATE OF HOUSING COST
IN TYPICAL SUBDIVISION WITH
MPDU ORDINANCE
40% Density Bonus

Lot Size: 4,000 Square Feet
Dwelling Size: 1,200 Square Feet
Subdivision Size: 146 Lots; 20 Acres
Density: 7.3 DU/AC (gross)
Raw Land Price: \$60,000/Acre

<u>Cost Factors</u>	<u>Conventional 124 Units</u>	Below Market Price
		<u>22 Units</u>
Land Price	\$ 9,320	\$ 2,000
Site Improvements	6,600	6,600
Construction (\$25.00/sq.ft.)	30,000	30,000
Permit Fees	1,600	1,600
Marketing and Sales	1,800	1,800
Financing	4,390	4,390
Administration	1,050	1,050
Pretax Profit	<u>5,480</u>	<u>4,740</u>
	\$60,240	\$52,180

ESTIMATE OF HOUSING COST
IN TYPICAL SUBDIVISION WITH
MPDU ORDINANCE
20% Density Bonus

Lot Size: 5,000 Square Feet
Dwelling Size: 1,200 Square Feet
Subdivision Size: 124 Lots; 20 Acres
Density: 6.2 DU/AC (gross)
Raw Land Price: \$60,000/Acre

<u>Cost Factors</u>	<u>Conventional 105 Units</u>	Below Market Price
		<u>19 Units</u>
Land Price	\$10,880	\$ 2,000
Site Improvements	6,600	6,600
Construction (\$25.00/sq.ft.)	30,000	30,000
Permit Fees	1,600	1,600
Marketing and Sales	1,800	1,800
Financing	4,390	4,390
Administration	1,050	1,050
Pretax Profit	<u>5,510</u>	<u>4,740</u>
	\$61,830	\$52,180

INCLUSIONARY ORDINANCE

Moderately Price Dwelling Unit Ordinance (MPDU)

PURPOSE: To assist moderate income households to purchase housing.

APPLICATION: Urban residential developments of medium density (7.3 du/ac) or greater containing 40 or more units

DENSITY BONUS: Maximum twenty percent density bonus. Fifteen percent of units will be MPDU. For example, in a typical 100-unit development, 120 units would be permitted, 18 units would be required to be sold under the MPDU Ordinance.

PRICE: Maximum price set by County reflecting production cost and land costs (builder's profit included in production costs).

AVAILABILITY: Person earning moderate income (household income approximately \$12,000 to \$19,000).

CONDITIONS: Buyers of MPDU will be precluded from wind-fall profits.

FINANCING: Obtained from lending institutions. No direct subsidy by government.

MEDIAN HOUSEHOLD INCOME

	<u>Unincorporated Area</u>	<u>Total County</u>
1974*	\$12,496	\$10,982
1975**	13,120	11,531
1976**	13,776	12,107
1977**	14,465	12,713

* 1975 Special Census

**Estimated. Projection based on median income change between 1968-74; 5 percent/year.

	<u>Median Income Total County</u>	<u>Affordable Home*</u>	<u>Average Priced Home</u>
1974	\$10,982	\$27,455	\$40,265
1975	11,531	28,827	45,690
1976	12,107	30,267	52,280
1977	12,713	31,782	57,300**

* Income/Cost Rule: 2.5 X Annual Income

**Source: Housing Impacts, Sept. 1977
San Diego Economic Bulletin, Nov. 1976

MEDIAN PRICE OF UNITS SOLD
SAN DIEGO COUNTY

<u>Quarter Ending</u>	<u>Detached</u>	<u>Attached</u>	<u>Weighted Median Average</u>
APR 1976	\$47,000	\$39,100	\$44,100
JUL 1976	47,400	42,000	45,500
OCT 1976	51,800	45,700	48,700
JAN 1977	52,400	45,400	49,800
APR 1977	57,300	55,700	56,600
JUL 1977	57,900	56,200	57,300

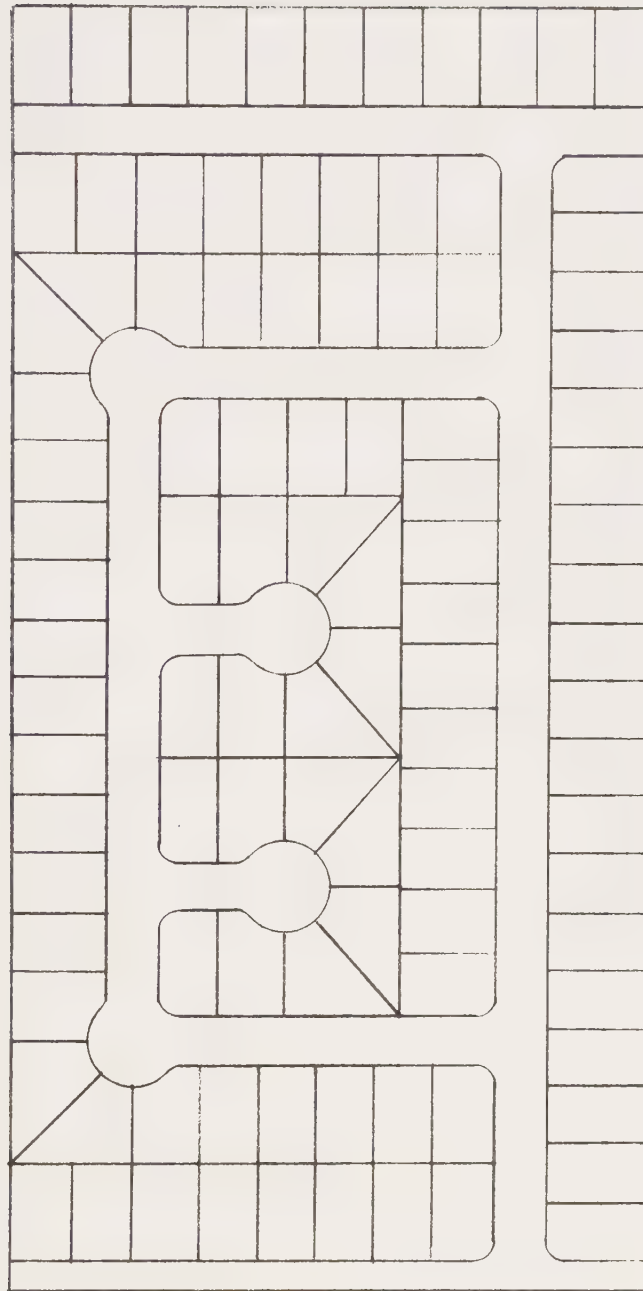
Source: Housing Impacts, Sept. 1977

SALES DISTRIBUTION OF NEW UNITS
BY PRICE RANGE

SAN DIEGO COUNTY
(June - August 1977)

	<u>Detached</u>	<u>Attached</u>	<u>Total</u>
Under \$30,000	-	3.0	1.2
\$30,000 - \$39,999	0.7	10.5	4.4
\$40,000 - \$49,999	21.2	19.6	20.6
\$50,000 - \$59,999	34.1	27.0	31.3
\$60,000 - \$69,999	14.4	19.6	16.4
\$70,000 - \$79,999	12.0	5.5	9.5
\$80,000 - \$89,999	6.0	3.8	5.2
\$90,000 - \$99,999	2.2	0.8	1.7
\$100,000 - \$109,999	2.1	5.1	3.2
\$110,000 - Over	<u>7.3</u>	<u>5.1</u>	<u>6.5</u>
TOTAL	100.0	100.0	100.0
UNITS SOLD	3,124	1,790	4,914

Source: Housing Impacts, Sept. 1977

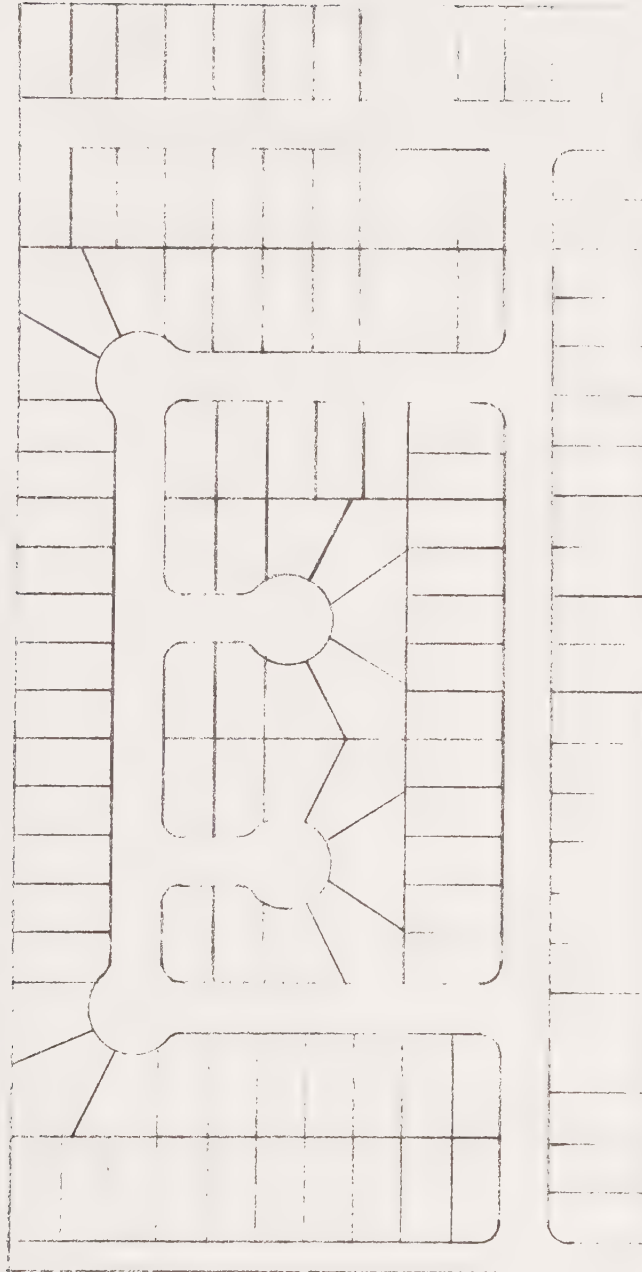


TYPICAL SUBDIVISION - 6,000 SQ. FT. LOTS

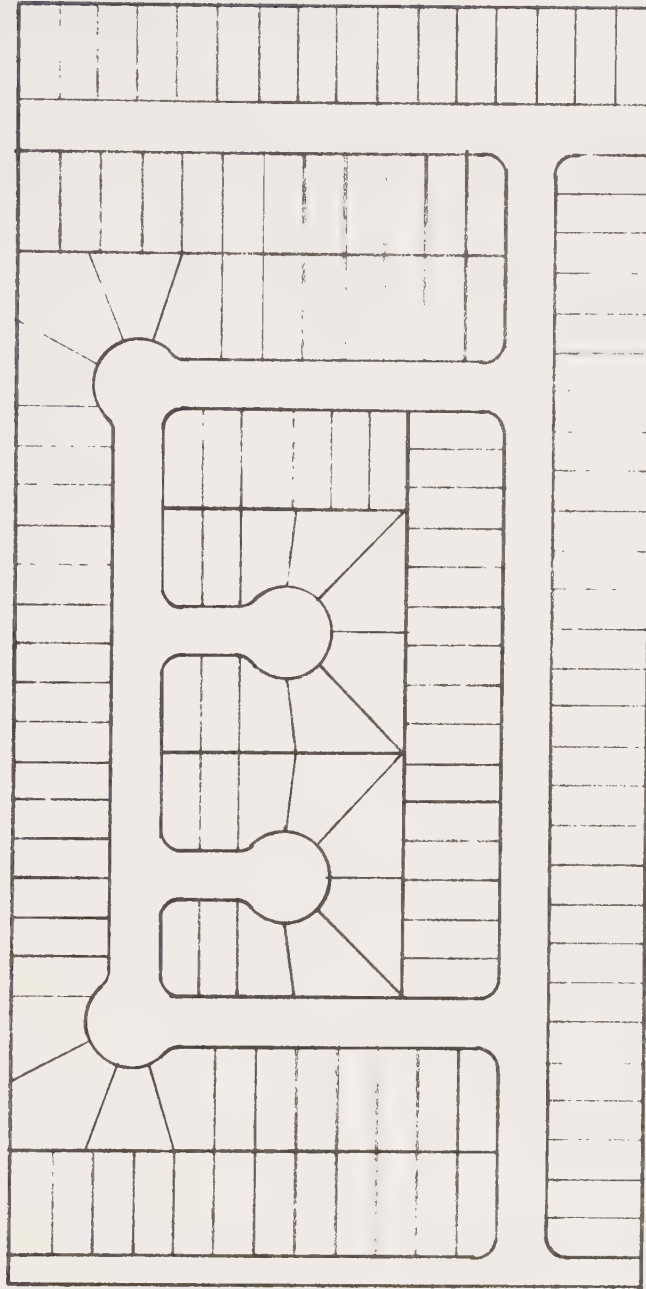
EXISTING ZONING - R-1-A PROPOSED ZONING - R-5-6

GENERAL PLAN - MEDIUM RESIDENTIAL

ACRES - 20.0 NO. OF LOTS - 103 D.U. - 103 D.U./AC. - 5.15



TYPICAL SUBDIVISION - 5,000 SQ. FT. LOTS
EXISTING ZONING - R-5 PROPOSED ZONING - R-S-5
GENERAL PLAN - MEDIUM RESIDENTIAL
ACRES - 20.0 NO. OF LOTS - 122 D.U. - 122 D.U./AC. - 6.1



TYPICAL SUBDIVISION - 4,000 SQ. FT. LOTS

EXISTING ZONING - — PROPOSED ZONING - R-5.4

GENERAL PLAN - MEDIUM RESIDENTIAL

ACRES - 20.0 NO. OF LOTS - 146 D.U. - 146 D.U./AC. - 7.3

MODERATELY PRICED DWELLING UNIT ORDINANCE

An Act to add a new Section 81.406, title, "Housing, Moderately Priced", to the San Diego County Subdivision Ordinance, to provide that any applicant who submits a tentative map for development of forty or more dwelling units at one location shall, prior to any approval, submit to the San Diego County Planning Commission a written agreement in which he or she shall agree that not less than fifteen percent of the number of dwelling units covered by a subdivision map shall be moderately priced dwelling units; to define moderately priced dwelling units and to provide for redefinition by written regulation of the Moderately Priced Dwelling Unit (MPDU) Program Administrator to take into account increased production costs and other changed circumstances from time to time; to provide for a waiver of such requirement by the Planning Commission in unusual cases of hardship, or when prevented by law, or other good cause; to provide for a procedure for sale of residence; to grant an election to the applicant to convey undeveloped land, or developed or partially developed land or to pay fees to the County or its designee in lieu of the inclusion of moderately priced dwelling units; and establishing provisions for enforcement of the Act.

Be it enacted by the San Diego County Board of Supervisors that:

There is hereby added to the San Diego County Subdivision Ordinance a new Section 81.406, title "Housing, Moderately Priced", to read as follows:

SECTION 81.406. HOUSING, MODERATELY PRICED

81.406.1 Declaration of Legislative Findings

It is hereby found and declared that there exists within San Diego County a serious shortage of housing for moderate income persons whereby the sales price of housing units in the open market greatly exceeds the purchasing power of many residents of the County desiring to purchase a dwelling; that this shortage of safe and sanitary dwellings of moderate cost cannot be wholly relieved without some mandatory regulation on the operation of private enterprise which will require the production of unsubsidized dwelling units at reasonable and moderate prices which can be constructed without monetary loss to private enterprise; and that therefore, the mandatory requirement of construction of such moderately priced housing dispersed within the

County, consistent with the General Plan, for residents who wish to live and work within San Diego County is necessary to insure the continued healthy economic growth of the County; and such inclusionary purpose is hereby declared, as a matter of legislative determination, to be a valid public purpose.

81.406.2 Definitions

The following words and phrases, wherever used in this Act shall have the following meanings:

Applicant: The word "applicant" means any person, firm, partnership, association, joint venture or corporation, or any other entity or combination of entities, who at any time after the _____ day of _____, 1978: Submits for approval a final subdivision map for proposed subdivisions whose tentative subdivision map was filed after the effective date of this Act, which final map provides for the development of a total of forty or more dwelling units at one location.

At one location: The phrase "at one location" means all adjacent land of an applicant, the property lines of which are contiguous or nearly contiguous at any point, or the property lines of which are separated only by a public or private street, road, highway or utility right-of-way or other public or private right-of-way at any point, or separated only by other land of the applicant, which separating land is not subject to the requirements of this Act at the time of the above-stated requests by the applicant.

Available for building development: The phrase "available for building development" means all land owned by, or under contract to, an applicant zoned for any type residential development, which will utilize public water and sewerage, and which is ready to be subdivided for construction and development.

Certifying Agency: The term "certifying agency" shall be the agency that certifies which members of the general public qualify as "persons of eligible income". The certifying agency shall be the San Diego County Housing Authority and shall compile a list of such persons of eligible income. The priority ranking of such persons on this list shall be based on the principle of first come, first served.

Moderately Priced Dwelling Unit: The phrase "moderately priced dwelling unit" means a dwelling unit which meets the following specification: The sales price of any housing (including closing costs and brokerage fees) which does not exceed the applicable maximum sales price set forth therein or as established from time to time by the MPDU Program Administrator. The (maximum sales price and the) regulations promulgated by the Administrator

shall take into consideration the private costs of production, the ability to pay of persons of eligible income, and any other data which at the discretion of the Administrator is deemed appropriate and relevant to the general market and economic conditions that currently exist. Until such amendatory regulations are issued by the Administrator, the following schedules shall constitute the maximum sales prices permitted for moderately priced dwelling units this Act: (These prices are not yet established by the proposed Administrator. It is anticipated that the price range would be in the 30,000 to 40,000 dollar area.)

MPDU Program Administrator. The term "MPDU Program Administrator" shall mean the Moderate Priced Dwelling Unit Program Administrator. Such administrator shall be designated by the San Diego County Housing Commission. The administrator shall have power to set prices for the moderately priced dwelling units; to issue regulations consistent with the terms of this Act; to temporarily suspend the provisions of this Act should the County moderately priced housing shortage temporarily subside (this Act would want to provide some standard for determining when the shortage had subsided); to suspend the requirements of this Act with regard to particular MPDU dwellings when such suspension is in the best interests of the County.

Persons of Eligible Income: The phrase "persons of eligible income" shall mean persons of low income consistent with the definition found in Section 34213 of the Health and Safety Code as determined by the certifying agency.

81.406.4 Principal Requirement

(a) Any applicant, when applying for a tentative map in a medium residential zone, specifically the R-1-A, R-2, R-2-A or PRD(5) to PRD(15), shall submit concurrently with his application for such map, to the Department of Land Use and Environmental Regulation, a written agreement on a standard form supplied by that Department, which has been approved by the Office of San Diego County Counsel. This agreement shall provide that not less than fifteen percent (15%) of the dwelling units at any one location permitted by density provisions under the present zoning classifications of the applicant's property shall be constructed as moderately priced dwelling units.

The agreement shall be signed by the applicant and all other necessary parties whose signatures are required by law for the effective and binding execution of contracts dealing with real property. If the applicant is a corporation, the agreement shall be signed individually by the principal officers of the corporation as well as by the corporation. It is the specific intent of this requirement to prevent partnerships, associations, corporations, and any other legally recognized entity from negating the requirements of this Act by collapsing. Assignments may be made of the agreement, subject to County approval, provided that the assignees under the agreements fulfill the requirements hereunder.

(b) An applicant shall not avoid the intent of this Act by submitting piecemeal applications or approval requests for subdivision maps, or building permits. Any applicant may submit a final subdivision map for approval, or request building permits for less than forty dwelling units at any one time, provided such applicant must agree in writing, as set out in subsection (a) above, that upon the next such application or request, he will comply with the requirements of this Act when the total number of requests at one location reaches forty or more dwelling units. In addition, the staging plan for all units permitted by any permit issued shall be so arranged that moderately priced dwelling units will be constructed along with the conventionally priced units, it being the intent of this provision that all higher priced units shall not first be constructed before the applicant constructs any moderately priced dwelling units.

81.406.4 Alternative Election

Notwithstanding the provisions of Section 81.406.3, any applicant may elect to perform the alternative in lieu of the full requirements set out in Section 81.406.3:

The applicant may sell a sufficient amount of raw land, or a sufficient number of finished buildable lots, to a designated housing development corporation, a non-profit sponsor, a private developer, or other individual or organization which has agreed in writing to construct the moderately priced dwelling units required of the applicant by Section 81.406.3, and which is found acceptable by the Program Administrator. In addition, such grantee must have demonstrated its ability to perform fully the requirements of this Act in place of the applicant, and such grantee shall be bound by the requirements of this Act to the same extent as the applicant, or its successor, would have been. Any consideration paid to the applicant for such sale to the grantee shall be based upon a formula established by the Administrator which shall take into consideration all costs incurred by the applicant and all benefits accruing to the applicant, such as increases in density permitted as a result of this Act.

81.406.5 Site Election

With respect to Subsection 3 or 4 of this Act, an applicant, with the prior approval of the Planning Commission or its designee, may construct the required number of moderately priced dwelling units, or sell sufficient raw land or finished buildable lots, at an alternate location from that for which a tentative map application has been submitted to the Department of Land Use and Environmental Regulation. In approving such alternate site, the Planning Commission shall take into consideration the intent of

this chapter to dispense moderately priced dwelling units within the County consistent with the General Plan, and to make it possible for employees who work within the County to live near their places of employment.

81.406.6 Density Bonuses: Waiver of Requirement

(a) Density Bonuses. Contemporaneously with the enactment of this Act, the San Diego County Board of Supervisors has enacted or will enact revisions to the text of the Zoning Ordinance for the County to grant a density bonus to the applicant upon acceptance of the applicant's agreement to build moderately priced dwelling units. The percentage of moderately priced dwelling units required by Subsection 3 of this Act shall be computed on the basis of the total number of units permitted in the base zone before the addition of the density bonus. The number of additional dwelling units yielded by the application of the density bonus to the base zone shall equal or exceed the number of moderately priced dwelling units that the applicant is required pursuant to this Act to build. The bonus density shall be a maximum of twenty percent in excess of the base zone density.

(b) Waiver of Requirement. Any applicant, upon a showing of sufficient evidence to the Planning Commission, may be granted a waiver from part or all of the requirements of this Act if the Planning Commission, or its designee, finds that because of exceptional topographical conditions or other extraordinary situations or conditions effecting specific parcels of land, the strict application of the requirements of this Act would result in peculiar and unusual practical difficulties to, or exceptional or undue hardship upon, the applicant; or because the applicant is prevented by law or other good cause from being able to use the increased density provision of the Zoning Ordinance for the construction of moderately priced dwelling units. Any waivers granted hereunder shall be strictly limited to a minimum. The Planning Commission may issue uniform and reasonable regulations implementing this subsection.

81.406.7 Distribution of Units; Certificates; Misstatements; Interagency Notice

(a) Sale to General Public. All moderately priced dwelling units required by this Act shall be offered to members of the general public who are persons of eligible income for sale to good faith purchasers to be used as their primary place of residence.

(b) Certificates. In consideration for being certified as a person of eligible income thereby authorizing participation in the Moderately Priced Dwelling Unit Program, each purchaser of

a moderately priced dwelling unit shall make the following four covenants to the County on a Certification form approved by County Counsel:

(1) That the purchaser is acquiring said unit for his own or her own, or family's use as their primary place of residence, and that he or she is not purchasing said unit for purposes of speculation, and that the purchaser will continue to occupy the dwelling; and

(2) That he or she agrees to make a full, complete and accurate statement of all income of the purchaser or purchasers of all household members; and

(3) That when and if he wishes to sell his unit, he will sell to the next person of eligible income on the list maintained by the certifying agency; and

(4) That when and if he wishes to sell his unit he will do so at the current price established by the Administrator.

A copy of the certifying agreement shall be filed with the County Recorder's Office with the deed to the moderately priced dwelling unit.

A purchaser shall not further encumber the dwelling unit without prior County approval. The heirs of the MPDU buyer shall comply with the covenants of Subsection 7b.

(c) Misstatement. A material misstatement of income by the purchaser to the certifying agency will be considered a breach of contract giving rise to several County remedies. A misstatement of income:

(1) Will be a criminal offense punishable by a year in the County jail, or a fine of up to \$10,000; and

(2) Will be grounds for an action by the County to divest the purchaser of his fee simple title: upon proving such misstatement in a court of competent jurisdiction the County will be authorized to order the sale, at the current price set by the administrator, of the dwelling unit to the next person on the list and the proceeds from said sale shall be remitted to the first purchaser; and

(3) Will be grounds for an action by the County against the purchaser for fraud.

These three County remedies shall be stated on the face of the certifying agreement in bold colored type and shall be explained to the buyer.

No applicant shall sell any moderately priced dwelling unit without first obtaining such certifying agreement from the purchaser. Prior to the sale by an applicant to any purchaser of any moderately priced dwelling unit constructed under this Act, the applicant shall request a determination by the Certifying Agency whether or not such proposed purchaser was a previous purchaser of such a dwelling unit. Previous purchasers shall not be permitted to purchase a second unit while they currently own a moderately priced dwelling unit.

(d) Interagency Notice. The Planning Commission or its designee shall notify the Housing Authority and any other appropriate housing agencies or corporations promptly upon the issuance of any building permit including moderately priced dwelling units.

81.406.8 Enforcement of Requirements

The provisions of this Act shall apply to all agents, successors and assigns of an applicant. No tentative map shall be approved nor final subdivision map recorded which does not meet the requirements of this Act.

In addition thereto, or in lieu thereof, the County may institute injunction, mandamus, or any other appropriate action or proceeding at law or equity for the enforcement of, or to correct violations of, this Act, and any court of competent jurisdiction shall have the right to issue restraining orders, temporary or permanent injunctions, mandamus, or other appropriate forms of remedy or relief.

81.406.9 Severability

The provisions of this Act are severable and if any provision, clause, sentence, subsection, word or part thereof is held illegal, invalid, unconstitutional, or inapplicable to any person, such illegality, invalidity, unconstitutionality, or inapplicability shall not affect or impair any of the remaining provisions, clauses, sentences, subsections, words, or parts of the Act or their application to other persons. It is hereby declared to be the legislative intent that this Act would have been adopted if such illegal, invalid, or unconstitutional provision, clause, sentence, subsection, work or part had not been included therein and if the person or circumstances to which the Act or part thereof is inapplicable had been specifically exempted therefrom.

81.406.10 Effective Date

This Act shall take effect on the 30th day following the date on which it becomes law.

APPENDIX VII. A. 4

LOW RENT HOUSING ORDINANCE

The purpose of this low rent housing ordinance is to encourage developers to provide available rental housing in the developing Candidate Growth Areas. A guarantee will provide that 15% of this housing will be available for low income persons receiving rent supplements. The ordinance applies to eight units or more in Candidate Growth Areas that will be constructed pursuant to any subdivision map approval after the effective date of this ordinance. Existing subdivided lots requiring no further subdivision prior to development will not be effected by this ordinance.

- PURPOSE: To assist low and moderate income households to rent housing by providing a continuing supply of units privately owned available to households receiving rent supplements.
- APPLICATION: Multiple family housing developments proposing 8 units or greater on lots that are created pursuant to a tentative map or tentative parcel map approved after the adoption of this ordinance.
- DENSITY BONUSES: Waivers from parking requirements can be requested to achieve increased densities on a case by case basis.
- RENTAL PRICE: To be determined by HUD Fair Market Price rental rates which is adjusted for family size. This price applies only when federal subsidies are available. When subsidies are not available the rent can be set at any price by the owner.
- Availability: To low income persons. (Household income 50% - 80% of median income.)

This ordinance will permit the Housing Authority to review tentative maps to establish whether low and/or moderate income housing can be provided at the specific site. Every reasonable effort has to be made to provide a minimum of 15 percent of the units for low or moderate income households.

LOW RENT HOUSING ORDINANCE

An Act to add a new section 81.407, title "Housing, Low Rent," to the San Diego County Subdivision Ordinance.

There is hereby added to the San Diego County Subdivision Ordinance a new section 81.407, title "Housing, Low Rent," to read as follows:

Section 81.407 Housing, Low Rent.

81.407.1 Declaration of Legislative Findings

It is hereby found and declared that there exists within San Diego County a serious shortage of housing for low income persons; that such shortage poses a serious threat to the public health, safety and general welfare of the citizens of this County; and that such shortage should be met immediately by steps to correct this shortage of low income housing.

81.407.2 Definitions.

Dwelling Unit, Low Income. A dwelling unit at a rental price which is eligible for subsidy under any public program to assist the occupancy of housing by households of low income who meet the current eligibility standards for low-rent public housing established by the Housing Authority.

Household, Low Income. A household which meets the current eligibility standards for low-rent public housing established by the Housing Authority.

Housing Authority. The San Diego County Housing Authority.

Housing Administrator. The Administrator shall be designated by the San Diego County Housing Commission.

Housing Development. The construction of any multi-dwelling unit having eight or more dwelling units which is being constructed for the purpose of rental.

81.407.3 Principal Requirement.

A. Requirements. 1. The developer of every housing development constructed pursuant to a building permit issued on a lot of a final map or parcel or tentative parcel map approved after the effective date of this ordinance shall (a) make every reasonable effort to develop at least 15 percent of the total number of units in the development at a cost which would allow them to be rented as a low income dwelling units at the fair market value, (b) if such units can be developed at such cost then make such units available at the fair market value to the Housing Authority or to low or moderate income households approved by the Housing Authority, and (c) execute such agreements with the Housing Authority as are appropriate to assure the continued availability of such units as low or moderate income dwelling units, which agreements shall be binding upon the developer and his successors in interest.

2. When the Housing Authority determines (a) that every reasonable effort has been made and that no units meeting the standards set forth in subsection B below can be developed at a cost which would allow them to be rented as low or moderate income dwelling units at the fair market value or (b) that no subsidy is available to permit the rental of the required units to low or moderate income households at the fair market value, the requirements of this section shall be met by the developer, in lieu of developing the units required by subsection A 1 above, giving the Housing Authority in writing the continuing right of first refusal to lease at the fair market value any of the units in the development, or to require that such units be leased at the fair market value only to low income households approved by the Housing Authority, up to a total of 15 percent of the total number of units in the development. The Housing Authority may exercise its right of first refusal, at the then fair market value, whenever thereafter all occupants of any unit in the development terminate or give notice of intent to terminate their occupancy, and after such termination fewer than 15 percent of the total number of units in the development would be occupied as low income dwelling units. The developer or his assignee shall immediately notify the Housing Authority in writing of any such termination or intent to terminate.

B. Standards. Low income dwelling units required by this section shall:

1. Be reasonably dispersed throughout the development;

2. Generally reflect the average number of bedrooms per dwelling unit for the development as a whole; and

3. Be designed to harmonize with other residential structures and units in the development.

C. Certification. No approval shall be granted to a tentative map or tentative parcel map for any housing development until application has been made to the Housing Authority and it has certified that such development complies with the requirements of this Section. The Housing Authority shall have the authority to require guarantees, to enter into recorded agreements with developers to take other appropriate steps necessary to assure that the required low income dwelling units are provided and that they are continuously occupied by low income households. When this has been assured to the satisfaction of the Housing Authority, and it has determined that the proposed development meets the requirements and standards of this section, it shall certify the application approved as to the housing requirements of this section, and shall transmit it to the Department of Land Use and Environmental Regulation.

D. Appeal. An applicant aggrieved by a determination or requirement of the Housing Authority in regard to this section may appeal to the Housing Commission. The appeal shall set forth specifically wherein the action of the Housing Authority fails to conform to the provisions of this section, or wherein its requirements are improper. When a appeal is filed the Housing Authority's file thereon shall be transmitted to the Housing Commission. If an appeal be denied, the action of the Housing Authority shall thereupon become final and conclusive.

E. Authority to Delegate. Wherever it is provided in this section that the Housing Authority shall perform certain functions, the performance thereof by the Housing Administrator shall be equally effective if the Housing Commission, by resolution, has authorized the Housing Administrator to act on such matters.

81.407.4 Effective Date

This act shall take effect on the 30th day following the date on which it becomes law.

Appendix VII. A. 5

MOBILEHOME LAND AVAILABILITY

On October 4, 1978 your Board requested the Growth Management staff to include in their on-going program a study of the vacant land available for mobilehome parks.

The issues that surround mobilehomes are more comprehensive than solely the question of land availability, although land availability in the future is the fundamental issue that surfaced to prompt this referral. (Mobilehome Park Application, September 7, 1977, San Marcos area).

The issues surrounding mobilehomes are numerous and should be evaluated before or concurrently with any discussion of available land. These issues include:

1. Tax inequities - mobilehomes are not taxed as real property. Sales taxes on transfers and "in lieu" taxes are collected. Revenues from "in lieu" tax is returned by state to cities, counties, and school districts. Special districts receive no revenues.
2. Construction and Safety Standards - Mobilehomes meet Federal construction standards, nevertheless these standards are less than "stick" built housing.
3. Zoning Regulations - Mobilehomes are required to be located within a park and are prohibited as permanent uses outside of parks. Mobilehome subdivisions are permitted.
4. Aesthetics - Many community groups oppose mobilehome parks

because of factors relating to design and appearance.

5. Low and Moderate Cost Housing - Since mobilehomes have been and are a potential source of lower cost housing, their continued addition to the total county housing stock will help satisfy the housing needs of low and moderate income households.

The amount of land available for mobilehomes is not easily quantifiable.

The PMD Zone, which permits Mobilehome Parks and Subdivisions subject to a Special Use Permit, is compatible with all residential plan designations. The densities permitted range from 1 du/ac to 8 du/ac. Potentially sufficient amounts of land are available for mobilehomes is that land planned at medium densities, with services available, consistent with other community plan requirements, and not producing any significant environmental impacts.

Since the above factors have to be balanced with the potential for lower and moderate cost housing, it is recommended that IPO include mobilehomes as part of the housing element revisions. Each Community Plan should address the availability of land for mobilehomes.

County of San Diego, California

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Purpose

To prevent or reverse deterioration by giving highest priority to the target areas identified in the Regional Growth Management Plan for County public facility expenditures.

Background

Areas which exhibit symptoms of deterioration or are rapidly urbanizing have been identified in the Regional Growth Management Program. These target areas were selected utilizing income factors, area stability factors, including housing conditions, homeownership and mobility and other criteria defined in the Housing and Community Development Act of 1974. These target areas should receive special consideration for the provision of facility improvements and social services in order to eliminate urban blight and to prevent it where rapid urbanization has led to special service facility deficiencies. By investing in target areas, County government can reduce or reverse the effects of deterioration, avert the greater costs of economic decline, low or declining tax yield and need for rehabilitation and attract and maintain a stable level of private investment.

The Regional Growth Management Program has determined that a comprehensive strategy for each identified target area is needed to effectively coordinate efforts to provide both public facilities and incentives for private investments which are needed to upgrade the areas. The strategy must include identification of the physical needs in each target area and identification of Federal, State and/or local resources which can be earmarked for meeting these needs.

The County's Capital Facilities Program for these target areas must reflect the upgrading of capital facilities which were identified in the target area strategy.

Policy

It is the policy of the Board of Supervisors that:

1. The County shall identify unincorporated target areas based on their need for upgrading to prevent or reverse deterioration. The designation of target areas shall be reviewed periodically.
2. For each target area, a comprehensive strategy shall be developed which includes:
 - a. Identification of community needs;
 - b. Identification of Federal, State, and/or local resources to be earmarked for meeting these needs.

County of San Diego, California

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3. Available resources will be allocated among target areas on the basis of the needs identified in the area profiles and the constraints of the specific funding source.

The multi-year budget planning guidelines shall include guidelines for the priority expenditure of County funds in the identified target areas.

4. A special analysis shall be prepared each year as part of the annual budget which identifies past and proposed expenditures directed at the target areas.
5. The Capital Facility Program shall be developed each year based on the target area concept.

All County implementing entities shall prioritize their capital facility programs in accordance with the identified target areas.

Procedure

Budget construction and capital facilities planning construction shall be addressed in the Capital Facilities Plan and Budget.

METHODOLOGY FOR TARGET AREA SELECTIONGeneral Method

Data covering 40 different characteristics of communities was compiled by census tract. The sources and date of collection of this information are listed below. The entire county area was covered, excluding only tracts primarily in military use. Three independent aspects of neighborhood change processes were operationalized. Scales measuring overall wealth, community stability and access of residents to employment were constructed. These scales provide a ready index of local conditions, summarizing a number of interrelated conditions with a single number.

The selection of target areas began with an examination of those areas falling within the lowest third in socioeconomic status. Recent rapid growth in certain areas outdated the statistics used in the analysis. In other areas, field checks showed that substantial portions of a tract were in incorporated areas, while the unincorporated areas showed no evidence of deterioration. Finally, tracts contiguous to low SES areas which ranked low in community stability or employment access of residents were also considered.

Index Construction

The indexes are simple additive combinations of linearly related variables. The socioeconomic status index consists of measures of income, overcrowding by household, educational attainment, mortality rate and births among juveniles.

The Community Stability index is composed of measures of the age and condition of the housing stock, rate of homeownership and the length of tenure of existing residents.

The employment access index combines unemployment rates, occupational level of household heads and the difference between the average occupational level of residents of a tract and the average skill level required by all employers in the subregional area.

These three indexes were checked for ability to predict incidence of other problems associated with neighborhood decline. These problems are: welfare needs, disease incidence, juvenile arrest rates and the Human Resources Agency index of need for social services.

A KEY TO THE GROWTH MANAGEMENT SOCIAL VARIABLES

<u>ITEM</u>	<u>FORMULA OR DEFINITION</u>	<u>SOURCE OF DATE</u>
For Scale of Socioeconomic Status		
Income	Median	1975 Special Census, IPO
Overcrowding	More than 1.01 persons/room	1970 Federal Census
Juvenile rate of births	Births to women under 18 divided by all women 15 to 45	1975 Special Census, IPO 1976 Health Department
Post High School Graduates	Percentage of household heads with at least one year of education beyond high school	1975 Special Census, CPO
Non-High School Graduates	Percentage of household heads with less than 12 years of education	1975 Special Census, CPO
Mortality	Deaths per thousand of total	1975 Health Department, San Diego County
For Scale of Neighborhood Stability		
Homeownership	Percentage of structures of one to four units for which a homeowners exemption was claimed; mobile homes excluded	1976 County Assessor's Summary
Age of Housing	Percentage of all units built prior to 1950	1970 Federal Census, 1977 IPO estimate of housing stock
Unsound Housing	Percentage of dwelling units requiring at least some repairs	1975 Special Census, County Housing Authority summary
Tenure of Residents	Percentage of total population residing in the community at least five years	1975 Special Census, CPO
For Evaluation of Employment Access		
Unemployment	Percentage of unemployed in the labor force	1975 Special Census, IPO

<u>ITEM</u>	<u>FORMULA OR DEFINITION</u>	<u>SOURCE OF DATA</u>
Occupational Average	A weighted ¹ average of the occupational levels of the employed	1970 Federal Census, CPO compiled
Area Employment	A weighted ¹ average of the occupations required by all industries in an area, allocated according to occupational structure of major industry categories	1975 Employment Inventory, CPO; 1975 Manpower Study, EDD
Access	The difference between occupational average of residents in a tract and the occupational requirements of industries in the subregional area, determined as above	Combines data above
Job Total ²	The total number of jobs of all types per dwelling unit	1975 CPO RCP Series IV data base; 1975 Special Census unit count
Retail Jobs ²	The total number of retail jobs per dwelling unit	1975 CPO RCP Series IV data base; 1975 Special Census unit count
Land Use Mix ²	Ratio of total residential assessed value to sum of commercial and industrial	1976 County Assessor Summary

-
1. Census weights for occupational status level:
 - 90 Professional, technical and kindred workers
 - 81 Managers, officials and proprietors, except farm
 - 71 Clerical, sales and kindred workers
 - 58 Craftsman, foremen, and kindred workers
 - 45 Operatives and kindred workers
 - 34 Service workers, including private household
 - 20 Laborers, except farm and mine
 - 16 Farmers
 - 6 Farm laborers

2. Not part of scale

<u>ITEM</u>	<u>FORMULA OR DEFINITION</u>	<u>SOURCE OF DATA</u>
Demographic and Social Problem Indicators		
Births	Fertility rate, percentage of women of child bearing age	1976 Health Department: 1975 Special Census, IPO
Family Size	Persons per dwelling units	1975 Special Census, IPO
Ethnicity	Percentage of blacks, Spanish American and other ethnic minorities in population	1970 Federal Census
Elderly	Percentage of population over 62 years old	1975 Special Census, IPO Summary
HRA Ranking	Composite Poverty Index of some 20 indices of poverty-related problems. See 1975 Fair Share Formula for details	1975 Fair Share Formula, based on 1970 Federal data
Welfare Clients	Persons per thousand receiving AFDC and General Relief/General Assistance support	1975 Welfare Dept., IPO
Welfare Payments	Dollars spent per person in AFDC GR/GA programs	1975 Welfare Dept., IPO
Illness	Incidence of reported cases of poverty related diseases: TB, shigella, salmonella, hepatitis, and syphilis per thousand population	1975 Health Dept., IPO
Juvenile Crime	Arrest rate for juveniles by SRA	1977 Comprehensive Youth Needs Assessment, HRA
Land Use Factors		
Growth	Increase in population between 1970 and 1975 as a percent of 1970 population	1970 Federal Census; 1975 Special Census,
New Building	Increase in dwelling units between 1975 and 1977 as a percent of 1975 dwelling units	1975 Special Census; 1977 Housing Inventory Estimate, IPO
Density	Dwelling units per gross acre	1977 Housing Inventory Estimate; CPO Land Use Inventory

<u>ITEM</u>	<u>FORMULA OR DEFINITION</u>	<u>SOURCE OF DATA</u>
Density Mix	Low density (1 to 4 unit) residential structures as a percent of all residential units	1976 County Assessor Summary
Unit Mix	Single Family detached units as a percentage of low density (1 to 4 unit) structures	1976 County Assessor Summary
Mobile Homes	Mobile home units as a percentage of total dwelling units	1975 Special Census, IPO
Average Value	Total assessed value of low density (1 to 4 unit) residential structures divided by the number of units	1976 County Assessor Summary
Lending Average	Average residential loan size for ten lenders in City/County lending study	1976 HRA data from HMDA disclosure form
Lending Rate	Number of loans for ten lenders in City/County lending study per thousand single family units	1976 HRA data; 1975 Special Census, IPO
Investing	Sum of convential residential loans made by 10 lenders studied by City/County Reinvestment Task Force as a percentage of total assessed value of residential properties of 1 to 4 units	1976 HRA data from HMDA disclosure forms, 1976 County Assessor Summary

TABLE 1: TARGET AREAS

Location and Tract	1975 Median Income	Housing Built Pre-1950	Condition of Housing (% Unsound)	Avg. Res. Assessed Value	Home Ownership	New Units 1975-1977	Special Conditions 1975	Indexes		
								SES	STAB	EMP ACCESS
County Average	\$10,982	23%	3.2%	\$36,900	63%	4%	11.4% Elderly 9.0% Unemployment 6.0% Mobile Homes	Ranking within CGA's only 1 = lowest		
Declining Areas Within Candidate Growth Areas										
Fallbrook 189.01	9,499	13.9	2.3	36,900	57	11.0	18.0 Elderly	7	19	50
189.02	9,342	11.7	15.8	41,321	58	9.0	27.0 Mobile Homes	5	5	43
Ramona 208	11,262	28.0	5.1	37,900	66	18		11	13	11
Santee 165	10,905	13.1	4.1	29,200	64	6	15.0 Elderly 23.0 Mobile Homes 10.8 Unemployment	10	24	8
162.02	9,186	9.7	2.5	29,700	67	4	Very high mobility rate: 17.5% of res. tenure exceeds 5 yrs.	6	7	6
166.03	12,003	3.8	3.4	30,400	80	0	15.0 Overcrowded households	26	58	7
166.02	9,219	8.1	3.9	22,800	24	1	Mostly in City of El Cajon	30	1	35
Spring Valley 138	12,607	19.2	9.3	32,900	67	5	13.0 Unemployed (Southern portion only)	44	39	53
139.01	11,428	15.7	4.6	29,600	58	5	18.0 Mobile Homes	19	14	31
139.02	11,618	2.2	4.0	32,900	73	12		12	34	23
140.01	12,922	22.9	4.4	28,500	64	2	Mostly in City of Lemon Grove	42	3	26
Sweetwater 122	8,062	58.7	7.8	17,112	48	1	14.2 Unemployed Welfare incidence twice County average	9	2	2

Location and Tract	1975 Median Income	Housing Built Pre-1950	Condition of Housing (% Unsound)	Avg. Res. Assessed Value	Home Ownership	New Units 1975-1977	Special Conditions 1975	Indexes		
								SES	STAB	EMP ACCESS
County Average	\$10,982	23%	3.2%	\$36,900	63%	4%	11.4% Elderly 9.0% Unemployment 6.0% Mobile Homes			
123	10,269	35.1	0.3	34,600	67	3	27.0 Elderly Mostly in City of Chula Vista	21	29	42
Montgomery										
131.01	9,588	12.5	5.3	29,500	66	7	10.9 Unemployed, high disease incidence	35	31	9
131.02	10,956	17.4	2.1	29,000	68	3		13	47	22
132.01	7,946	9.2	2.8	23,800	51	18	42.0 Mobile Homes 12.0 Unemployed	2	15	4
132.02	7,537	13.3	2.0	23,200	53	1	16.0 Mobile Homes 15.0 Unemployed	1	20	1

TABLE 2: SOCIAL AREA ANALYSIS SUMMARY

Location and Tract	1975 Median Income	Housing Built Pre-1950	Condition of Housing (% Unsound)	Avg. Res. Assessed Value	Home Ownership	New Units 1975-1977	Special Conditions 1975	Indexes		
								SES	STAB	EMP ACCESS
County Average	\$10,982	23%	3.2%	\$36,900	63%	4%	11.4% Elderly 9.0% Unemployment 6.0% Mobile Homes			
Fallbrook 189.01	\$ 9,499	13.9%	2.3%	\$ 36,900	57%	11%	18.0% Elderly	7	19	50
189.02	9,342	11.7	15.8	41,321	58	9	27.0 Mobilehomes	5	5	43
North Vista 192.01	9,021	13.3	1.3	33,800	74	5		27	38	48
192.02	10,603	19.0	2.1	48,700	72	91		16	16	13
193.00	8,312	12.4	6.5	34,200	46	NA		21	11	14
Buena 192.02	SEE NORTH VISTA									
196.00	10,774	14.8	1.7	40,200	72	3		33	42	63
199.00	10,689	20.9	6.1	39,800	72	17	16.0 Elderly	23	25	29
South San Marcos 200.01	10,773	2.9	1.8	45,400	72	8	31.0 Elderly	18	17	28
Carlsbad/SM Islands 178.02	16,066	3.6	1.6	42,600	71	90	13.0 Elderly 16.0 Mobilehomes	56	36	57
197.00	11,943	24.4	4.5	36,100	70	4		40	22	25
198.00	13,092	1.3	0.9	37,600	67	33	17.0 Elderly 40.0 Mobilehomes	47	21	61
Valley Ctr 191.02	11,307	18.1	1.7	52,800	65	9	16.0 Elderly 23.0 Mobilehomes	8	12	38
San Dieguito 171.00	26,636	7.2	0.8	112,300	74	22		67	28	58
173.00	17,564	11.9	3.1	60,500	68	7		63	18	59
174.01	10,750	19.3	3.7	43,900	41	7		50	8	30
174.02	15,581	3.8	0.8	50,700	77	27		60	44	45

Location and Tract	1975 Median Income	Housing Built Pre-1950	Condition of Housing (% Unsound)	Avg. Res. Assessed Value	Home Ownership	New Units 1975-1977	Special Conditions 1975	Indexes		
								SES	STAB	EMP ACCESS
County Average	\$10,982	23%	3.2%	\$36,900	63%	4%	11.4% Elderly 9.0% Unemployment 6.0% Mobile Homes			
San Dieguito	\$			\$						
175.00	8,625	24%	2.8%	37,700	43%	0%		32	9	27
176.00	11,058	15.0	3.1	44,400	65	6	17.0% Elderly 8.0 Mobilehomes	17	32	10
177.00	9,209	22.7	5.1	46,400	39	6	13.0 Mobilehomes 12.0 Unemployment	36	4	12
Poway										
170.02	14,163	0.9	0.6	38,800	78	20		48	33	47
170.01	20,189	3.1	0.2	58,900	80	10		65	62	65
170.03	15,906	3.2	0.6	43,800	81	0		55	36	51
Alpine										
212.01	11,211	23.5	3.8	51,800	66	6	17.0 Elderly 14.0 Mobilehomes	4	27	46
Blossom Val.										
168.02	9,396	11.6	17.3	40,800	73	NA	16.0 Elderly 23.0 Mobilehomes	31	6	54
Ramona										
208	11,262	28.	5.1	37,900	66	18		11	13	11
Lakeside/ Santee										
162.02	9,219	8.1	3.9	22,800	29	1		30	1	35
164.01	14,442	6.7	1.	38,400	80	16		45	65	34
165.	10,905	13.1	4.1	29,200	64	6	15.0 Elderly 23.0 Mobilehomes	10	24	8
166.01	11,496	1.9	1.3	33,700	76	6	35.0 Mobilehomes	34	46	33
166.02	9,186	9.7	2.5	29,700	67	4	33.0 Mobilehomes 17.0 Tenure	6	7	6
166.03	12,003	3.8	3.4	30,400	80	0	15.0 Overcrowded	26	58	7
166.04	18,692	1.2	0.6	35,700	87	7		51	45	18
167.01	13,758	12.3	2.4	36,300	79	3	12.0 Mobilehomes	41	48	44

Location and Tract	1975 Median Income	Housing Built Pre-1950	Condition of Housing (% Unsound)	Avg. Res. Assessed Value	Home Ownership	New Units 1975-1977	Special Conditions 1975	Indexes		
								SES	STAB	EMP ACCESS
County Average	\$10,982	23%	3.2%	\$36,900	63%	4%	11.4% Elderly 9.0% Unemployment 6.0% Mobile Homes			
167.02	\$10,737	18.7%	1.4%	\$ 35,400	73	1	13.0 Unemployment	25	43	21
168.01	11,275	9.1	2.5	35,800	76	10	31.0 Mobilehomes	20	37	24
169.00	13,346	30.6	3.1	43,217	76	11	16.0 Mobilehomes	39	41	20
164.02	10,545	19.	2.3	39,900	72	5		15	50	17
Valle de Oro / Rancho SD										
31.06	13,509	1.2	0.2	32,900	83	0		29	23	15
32.05	16,500	5.4	0.3	48,600	74	14		62	51	52
135.01	15,061	2.3	11.2	40,500	76	39		52	63	60
135.02	12,178	9.4	1.6	40,900	89	6	49.0 Mobilehomes	28	61	40
136.01	16,398	9.3	6.2	51,800	86	9		58	54	62
136.02	19,545	14.3	10.2	62,600	88	7		64	52	66
137.00	14,379	22.9	3.3	44,300	71	7		44	39	53
138.00	12,607	19.2	9.3	32,900	67	5	13.0 Unemployed	36	40	36
139.01	11,428	15.7	4.6	29,600	58	5	18.0 Mobile Home 8.6 Unemployed	18	14	31
139.02	11,618	2.2	4.0	32,900	73	12	11.0 Mobile Home	12	34	23
139.03	12,669	4.2	1.1	34,700	79	27	11.0 Unemployed	14	60	19
140.01	12,922	22.9	4.4	28,500	64	2		42	3	26
140.02	12,792	14.5	4.5	33,800	75	26	16.0 Unemployed	16	59	16
152.00	22,227	43.4	2.4	71,200	83	5	77.0 Post High Sch. Education	66	26	67
153.02	17,086	6.0	0.7	62,400	85	0	13.0 Mobile Home	57	66	64
154.01	14,984	7.1	3.4	62,800	80	24	14.0 Unemployed 14.0 Elderly	61	64	32
154.02	11,997	7.0	5.2	56,000	81	14	11.0 Unemployed	43	56	49
Jamul 213	13,200	35.8	0	41,600	60	0	20.0 Mobile Home	24	10	39

Location and Tract	1975 Median Income	Housing Built Pre-1950	Condition of Housing (% Unsound)	Avg. Res. Assessed Value	Home Ownership	New Units 1975-1977	Special Conditions 1975	Indexes		
								SES	STAB	EMP ACCESS
County Average	\$10,982	23%	3.2%	\$36,900	63%	4%	11.4% Elderly 9.0% Unemployment 6.0% Mobile Homes			
Bonita Miguel 134.02	SEE BONITA									
Poggi Canyon 133.05	15,138	1.4	4.7	39,700	80	3		45	53	41
Sweetwater 134.02	18,352	3.6	2.3	50,200	84	18		53	57	56
Rice Canyon 32.04	15,472	11.6	3.0	43,500	85	9		59	50	37
32.05	16,500	5.4	3	48,600	74	9		SEE	VDO	
122.00	8,062	58.7	7.8	17,112	48	1	20.0 Mobile Home	9	2	2
123.00	10,269	35.1	0.3	34,600	67	1	27.5 Elderly	22	29	42
134.01	17,920	8.0	0.1	44,600	80	1		49	67	55
Montgomery 131.01	9,588	12.5	5.3	29,500	66	7	14.0 Mobile Home	35	31	9
131.02	10,956	17.4	2.1	29,000	68	3		13	47	22
132.01	7,946	9.2	2.8	23,800	51	18	42.0 Mobile Home 12.0 Unemployed	2	15	4
132.02	7,537	13.3	2.0	23,200	53	1	16.0 Mobile Home 15.4 Unemployed	1	20	1
133.04	14,210	4.1	0.1	35,500	78	6		37	55	5
EDD 100.00	9,635	11.4	2.3	30,500	71	2.4		3	30	3

